bds Biscom Delivery Server

User’s Guide

October 2007

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Introduction

Using Biscom Delivery Server to securely send files, messages, and documents is as easy as sending an email, and provides users with much greater control over how, when, and who receives your important data and documents.

Biscom Delivery Server features include:

- Delivery of any type of file or message
- Microsoft Outlook integration (optional feature)
- Delivery to anyone with a valid email address
- Control of access privileges to files
- User authentication
- Detailed reporting, including reports on deliveries, packages, and users
- Ability to schedule and expire deliveries
- Password-protected deliveries
- Email notification when a recipient views a delivery
- Easy customization, including logos, colors, and fonts, through style sheets
- Java API for tight integration with existing applications and databases

This User's Guide is written for users of the Biscom Delivery Server application and will cover the following topics:

- Biscom Delivery Server Concepts and Overview
- General Navigation and Search
- Registering and Signing In
- Packages and Deliveries
- Receiving Deliveries
- Managing Contacts
- Viewing Reports
- Frequently Asked Questions

Section 1: Biscom Delivery Server Concepts and Overview

Secure File Transfer

Biscom Delivery Server is designed to securely send email, files, and/or "packages" of files. Secure file transfer involves three simple steps:

1. Create a package of files and deliver it to any email address
2. Recipients are notified of their secure delivery in an email message
3. Recipients sign in to BDS, retrieve the package, and download the files

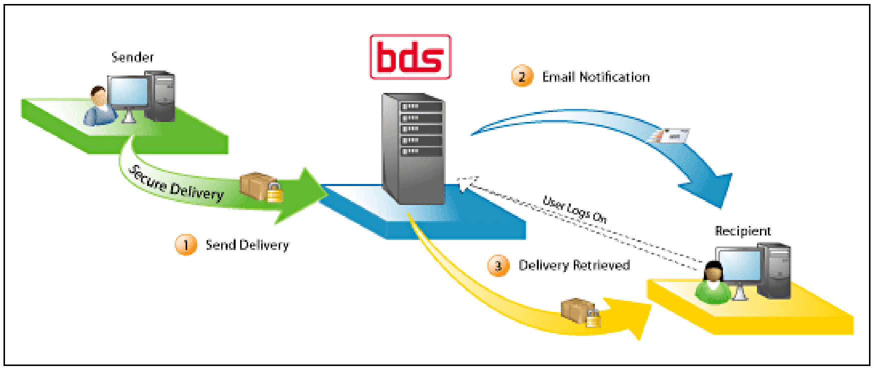


Figure 1: Secure file transfer

Packages

A package is a collection of files and documents along with additional information about the files and ownership, which we define in this document as *metadata*. A package is the entity that is delivered to recipients. The contents and metadata of a package may be updated at any time – the package name, label, and description may be changed, and files may be added or removed.

Deliveries

Packages are made available to recipients through deliveries. Deliveries are the vehicles through which recipients access packages and through which access control is maintained. A delivery consists of the following elements:

- List of one or more recipients
- Secure message
- Notification email
- Delivery parameters

Delivery parameters may include dates the recipient can access the package, password protection, and other delivery restrictions. Only a valid email address and a subject are required to send a delivery. If a package is updated, a user accessing the package through the delivery will always access the latest package files and metadata, even if the user received the delivery for a previous version of the package.

Users and Roles

Biscom Delivery Server users fall into four types or roles: **Recipient**, **Sender**, **Reporter**, and **Administrator**. Each role is associated with different privileges and access to Biscom Delivery Server functionality as described in the table below.

Recipient	Recipients can receive and view packages that senders deliver. Recipients may sign in to Biscom Delivery Server and view all the deliveries they have been sent or may use the URL sent to them through an email delivery notification to go directly to the specific delivery. ***Note:*** *Some deliveries may not require a recipient to have a registered user name. While all other roles require the user to be registered, some recipients may not be required to sign in to the application. These users can only access the specific deliveries they have received and can only view the deliveries through the link provided in the notification email.*
Sender	Biscom Delivery Server users with a Sender role have the ability to create packages and deliver them. Senders own the packages they create and can also be included as an owner of packages that other Senders create. Senders who own packages can modify packages and create deliveries for those packages. A package may have Senders who do not have the ability to edit the package metadata or files but who do have permission to deliver it. Senders can view reports on packages and deliveries they have created or that the Sender owns or can send.
Reporter	Reporters have the ability to view special reports and analyses. This role might be assigned to a high-level manager for example.
Administrator	Administrators have access to user management features. Administrators can add, modify, disable, delete, and assign roles to users. Administrators can also view user activity reports. Administrators have the ability to configure the application and to start and stop various system processes.

A user may have multiple roles simultaneously, which provides the user access to different features of Biscom Delivery Server. Administrators assign roles during user creation or user import. When users register on their own, the system automatically assigns the default roles defined by the Administrator, which is most often the Recipient role. Only administrators can assign additional roles to the newly registered users.

To sign in and use the Biscom Delivery Server application, users must authenticate themselves by entering a user name and password. Users must be registered with the Biscom Delivery Server application, either through a self-registration process or created by an Administrator. Once signed in, users have different privileges and will see different icons and features according to their roles. Depending on a user's privileges, a user may administer the system, create and deliver packages, retrieve packages delivered to him or her, and/or view reports.

Reports

Reports enable users to view activity and other information such as package creation and update, delivery creation, notification, and receipt, and user activity. The reports available to a user depend on the roles the user has been assigned. Senders can view reports on deliveries and packages that they own or can send. Administrators can view user activity. Administrators cannot view delivery or package activity unless they have been assigned the Sender role and are also one of the package owners or senders.

Section 2: General Navigation and Search

General Navigation

The application uses icons (with corresponding text hyperlinks) to represent functionality and help convey information to the user visually. Rollover text boxes accompany most icons.

Application navigation is handled through buttons and hyperlinks. Generally, clicking on successive links, icons, or buttons takes users to more detailed pages, and are deeper in the hierarchical layout of the application.

To help the user manage his or her location within the application, a hyperlinked *breadcrumb trail* presents the path a user has taken to reach a particular page. Users can click on links in the breadcrumb trail to return to any page along the path. Below, the breadcrumb trail has three parts separated by the ">" sign: *Home > Manage Packages, Package: BDS Client – upload manager.*

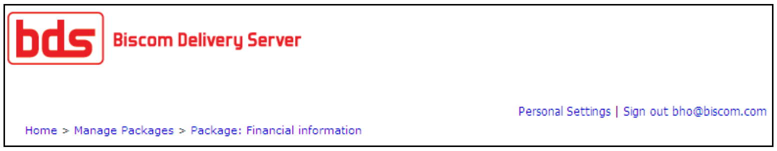

bds
Biscom Delivery Server
Personal Settings | Sign out bho@biscom.com
Home > Manage Packages > Package: Financial information

Figure 2: Breadcrumb trail navigation

Pages featuring lists, such as deliveries, packages, users, and reports often have columns that support sorting. Columns that can be used in sorting lists will have visual cues to indicate which columns can be sorted, the current column being sorted, and the sort order (ascending or descending). If a list can be sorted by a column, click the column name to sort by that column. If the list is being sorted by that column already, the sort order will be reversed, otherwise, the listing will be sorted in the default sort order of the column.

Lists may span multiple pages to make long lists more manageable. Lists with multiple pages will have a navigation bar that allows users to move forward or backward one page at a time, to jump to the first page or last page in a list, or to go to a specific item number in a list.

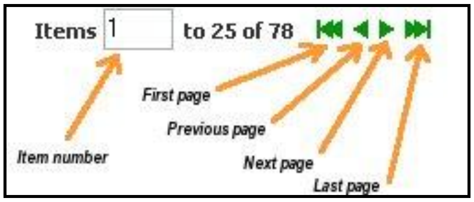


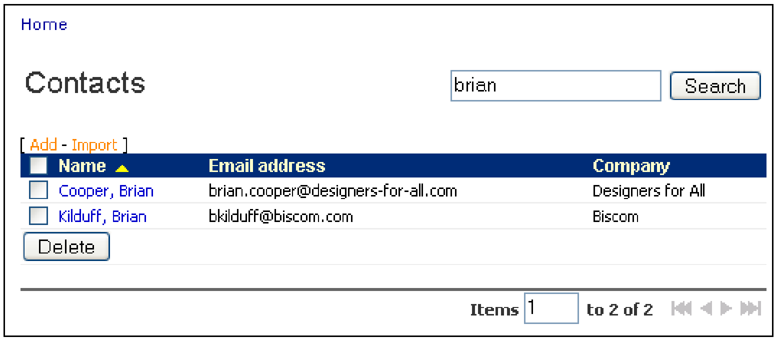
Figure 3: List navigation

To jump to a specific item number, enter the item number in the text box and press the **Enter** key. To move forward or backward by a single page or to the first or last page of the list, click the single or double arrow icons.

Search

Several pages contain a search box that can be used to narrow down a list: Received deliveries, contacts lists, package lists, reports, and several other pages support search. Search results are limited to the particular list you are currently viewing. Note that not all fields are searchable. To view the fields that are searchable, position your mouse pointer over the search box and the searchable fields will be displayed.

The search terms you enter in the search box will return results that contain any of your search terms; the search function is not case sensitive. So, searching for *john smith* will return any results that contain the word *john* or the word *smith*, including words that *john* is a part of such as *Johnson*. Wildcards are not supported by the search function.



Contacts

brian

[Add - Import]

☐	Name ▲	Email address	Company
☐	Cooper, Brian	brian.cooper@designers-for-all.com	Designers for All
☐	Kilduff, Brian	bkilduff@biscom.com	Biscom

Items 1 to 2 of 2

Figure 4: Search results

Section 3: Registering and Signing in

Registering New Users

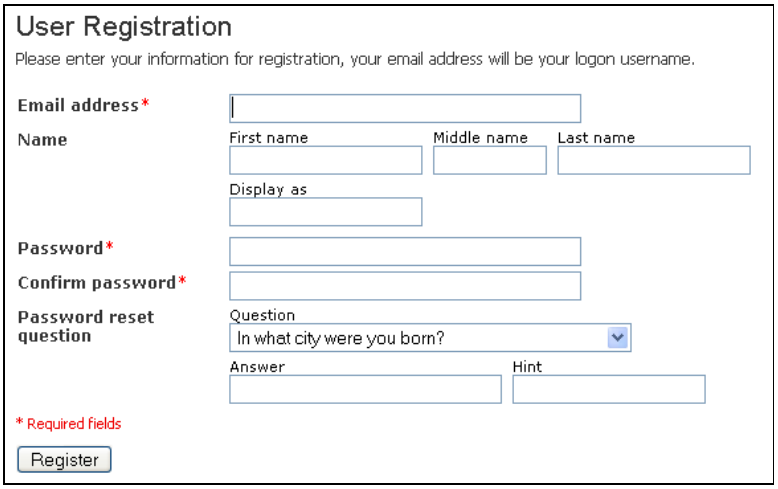
New Users

An Administrator may create users or users may complete a registration form themselves. Administrators can create a user and assign any role to the user. Self-registered users are automatically assigned one or more roles that are defined as the default roles by an Administrator; most Administrators will only assign the Recipient role by default. When an email address that is not currently part of the system is added as a recipient, the user is considered *pre-registered*. An Administrator can update pre-registered users' roles; when a pre-registered user completes his or her registration, the user will have functionality for all roles assigned by default or by an Administrator. If you require additional roles, please contact your Biscom Delivery Server Administrator.

Registering as a New Recipient

To register as a new Biscom Delivery Server user (Recipient role only), follow these steps:

1. From the sign in page, click the registration link to go to the registration page.



User Registration

Please enter your information for registration, your email address will be your logon username.

Question: In what city were you born?

Figure 5: User registration

2. An email address and password are required to create a new user. All other fields are optional.

> ***Note***: *Each email address is a unique user – if you have more than one email address, use the email address for which you would like to receive deliveries.*

3. Enter your password again to confirm it.
4. You may be required to enter a password reset question. Depending on the server configuration, you may be allowed to select from a list of questions or you may be allowed to enter your own question. If this is required, you must select a question

and enter an answer to the question. A hint is optional, but it may help you remember the answer to the question.

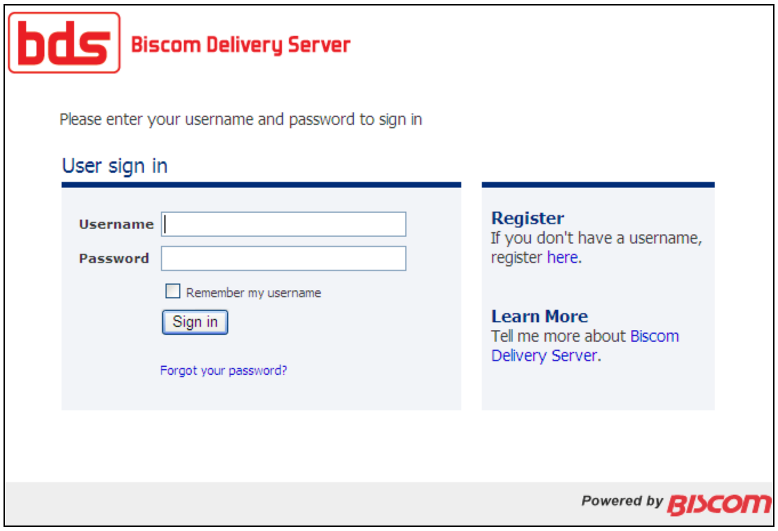
5. Click the **Register** button to complete the registration process.

Signing In and Signing Out

Signing In

To sign in to the Biscom Delivery Server application, follow these steps:

1. Go to the sign in page. If you clicked a link in an email message that notified you that you had a delivery, you are directed to the Sign In page. Otherwise, enter the URL given to you by your system administrator.



Please enter your username and password to sign in

If you don't have a username, register here.

Tell me more about Biscom Delivery Server.

Figure 6: Signing in

2. Enter your email address as your user name.

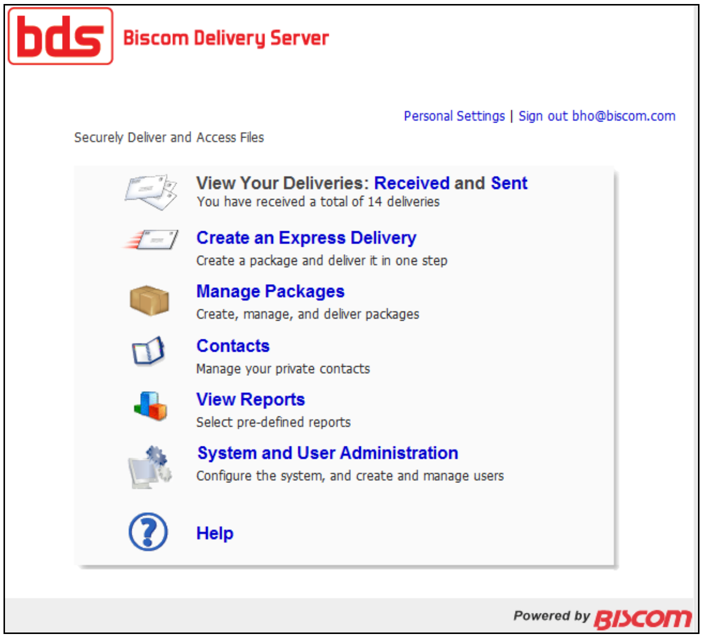
3. Enter your password.

4. For LDAP and Active Directory enabled applications, a *domain* field will be displayed. Administrators may assign a default domain for users, so you may not need to enter a domain in this field. If no domain field is visible and you have a specific domain you would like to use, pre-pend the domain to the username as follows: `<domain name>\<username>`

5. Optionally check the "Remember my username" checkbox to save your user name the next time you sign in.

6. If you've forgotten your password, click the **Forgot your password** link. Resetting your password will only be available to users who entered a password reset question and answer when they registered (see Registering as a New Recipient, page 11). If you have not entered this information, you must contact an Administrator to reset your password.

7. You are directed to the Home page.



Biscom Delivery Server

Personal Settings | Sign out bho@biscom.com

Securely Deliver and Access Files

View Your Deliveries: Received and Sent
You have received a total of 14 deliveries

Create an Express Delivery
Create a package and deliver it in one step

Manage Packages
Create, manage, and deliver packages

Contacts
Manage your private contacts

View Reports
Select pre-defined reports

System and User Administration
Configure the system, and create and manage users

Help

Powered by BISCOM

Figure 7: Home page

The icons you see on the Home page are determined by the roles you are assigned. The page above shows the Home page for a user with the Recipient and Sender roles.

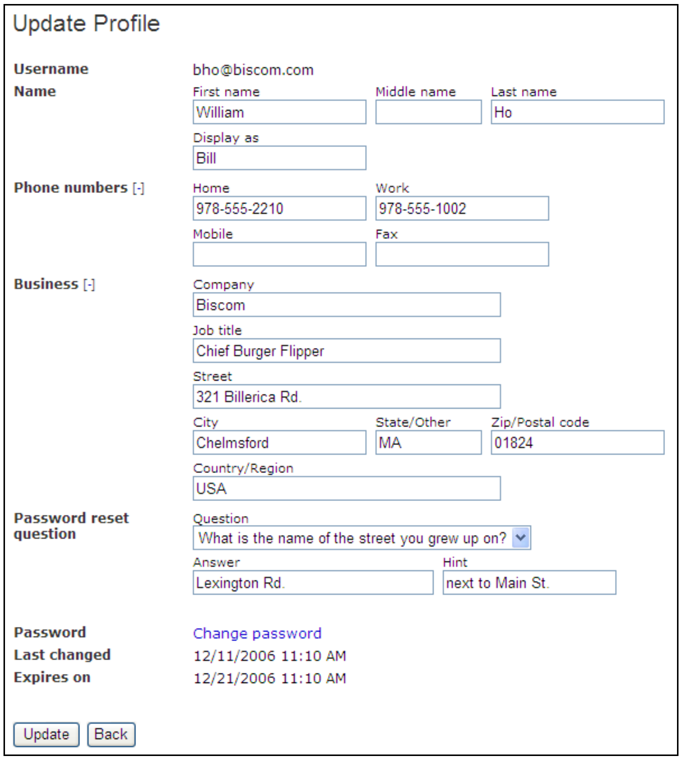
Signing Out

To sign out and end your Biscom Delivery Server session, simply click the **Sign out: <youremail@address.com>** link at the top right of the page.
Biscom Delivery Server will also sign out users automatically after a certain period of inactivity. Please ask an Administrator if you have questions about the session timeout duration.

Changing your Personal Settings

To update your personal information, reset your password, or update your password reset question and answer, follow these steps:

1. Click the **Personal Settings** link at the top right of any page.



Update Profile

Username bho@biscom.com

Name
First name: William
Middle name:
Last name: Ho
Display as: Bill

Phone numbers [-]
Home: 978-555-2210
Work: 978-555-1002
Mobile:
Fax:

Business [-]
Company: Biscom
Job title: Chief Burger Flipper
Street: 321 Billerica Rd.
City: Chelmsford
State/Other: MA
Zip/Postal code: 01824
Country/Region: USA

Password reset question
Question: What is the name of the street you grew up on?
Answer: Lexington Rd.
Hint: next to Main St.

Password Change password
Last changed 12/11/2006 11:10 AM
Expires on 12/21/2006 11:10 AM

Figure 8: Personal settings

2. On the Update Profile page, enter or change your personal information, update your password reset question and answer, and click the **Update** button. When done, click the **Back** button to return to the main menu.

   If the system has pre-defined password reset questions, you must choose one of the questions to answer. If the system has not defined any password questions, you may enter your own question to answer. In order to use the password reset feature, you must select a question and supply an answer.

> ***Note:*** *If you modify your personal information, and click the* ***Change Password*** *link, your changes will be lost. Click the* ***Update*** *button first to save any changes before changing your password.*

3. To change your password, click the **Change Password** link on the Update Profile page.
4. Enter your current password in the Old Password box.
5. Enter a new password in the New Password box.
6. Re-enter the new password in the Confirm Password box.
7. Click the **Update** button to save your new password.

Section 4: Packages and Deliveries

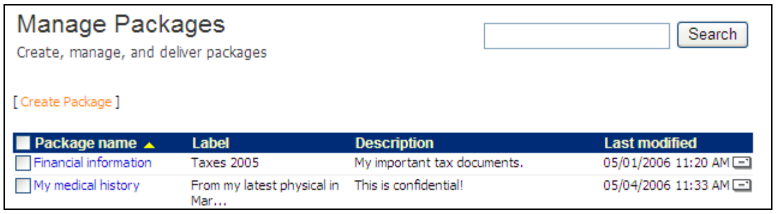
Packages

Users who have the Sender role can create and deliver packages.

Creating a New Package

To create a new package to send to recipients, follow these steps:

1. From the Home page, click the package icon or the **Manage Packages** link. A list of your existing packages will appear:



Manage Packages

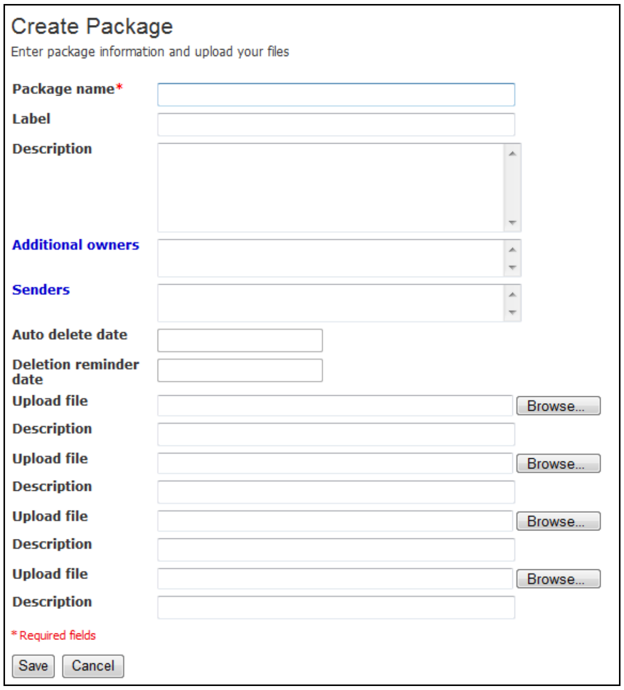
Create, manage, and deliver packages

[Create Package]

☐ Package name ▲	Label	Description	Last modified
☐ Financial information	Taxes 2005	My important tax documents.	05/01/2006 11:20 AM
☐ My medical history	From my latest physical in Mar…	This is confidential!	05/04/2006 11:33 AM

Figure 9: Package list

2. Click the **Create Package** link above the list. The Create Package page appears (below).



Create Package

Enter package information and upload your files

Package name*
Label
Description
Additional owners
Senders
Auto delete date
Deletion reminder date
Upload file
Description
Upload file
Description
Upload file
Description
Upload file
Description

* Required fields

Figure 10: Create Package page

3. Enter the following information in the appropriate boxes:

Package Name	Enter a descriptive name for the package of files.
Label	Enter optional information such as a version number, date, keywords, or any other notes.
Description	Enter an optional description of the package.
Additional owners	Owners are other users in the system who have access to the package and who can add files and modify the package metadata. Users must have the Sender role assigned to them in order to be an owner of a package. There are two ways you can assign additional owners: • Enter the email addresses of any additional owners of the package. Separate email addresses with a comma or semicolon. • Click the Additional Owners label to see a list of your contacts. Click the Owners checkbox next to the contacts you want to designate as additional owners. Note that the package creator is automatically added as an owner and does not have to be added to this list.
Senders	Senders are users who can deliver the package, but who cannot modify the metadata or add or remove files. There are two ways you can create senders: • Enter the email addresses of any users you want to designate as senders. Separate email addresses with a comma or semicolon. • Click the Senders label to see a list of your contacts. Click the Senders checkbox next to the contacts you want to designate as Senders.
Auto delete date	***Note:*** *This field appears only if your system administrator has enabled this feature.* This field specifies the date and time at which the package, including any deliveries and files, will be deleted by the system. The default number of days before package deletion is specified by your system administrator Note that the system administrator may specify certain users or groups to override the package deletion date. Those who do not have the ability to change the date will see a non-editable text box with a date automatically entered for you.

Deletion reminder date	***Note:*** *This field appears only if your system administrator has enabled this feature.* Before the system deletes a package, an email notification can be sent to all owners and senders of the package on the date and time specified in this text box.
Upload file	For each file you want to include in the package, enter a specific file location in the text box or click the **Browse** button to browse your system and select the file. Your Administrator determines the number of file upload slots. If you need to add more files than the number allowed on this form, you can edit the package later and add additional files.
Description	Enter an optional description of the file.

4. When you are finished entering the package metadata and files, click the **Save** button at the bottom of the screen.

   Once the package is saved, it is now available to the specified owners who can add files, modify the package metadata, and deliver the package.

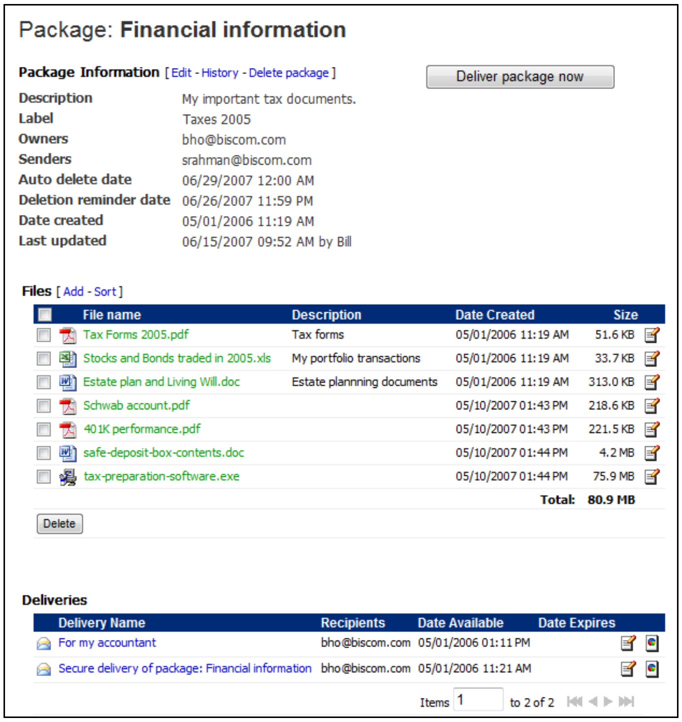
   Your Biscom Delivery Server administrator may have set the server to send an email notification out to the users who are added as additional owners or senders. Check with your administrator to see if this notification setting is enabled or not.

> ***Note****: The package has only been created at this point and it is not yet considered a Delivery. To send the package to a recipient, see Deliveries on p. 20.*

Viewing Packages

You can view the packages that you created or packages that other users have created that you own.

1. From the Home page, click the package icon 📦 or the **Manage Packages** link. A list of your existing packages will appear
2. Click the desired package name link to view the specific package details.
3. The Viewing Package page will display the package metadata, files, and existing deliveries (below).



Package: **Financial information**

Package Information [Edit - History - Delete package]

Description My important tax documents.
Label Taxes 2005
Owners bho@biscom.com
Senders srahman@biscom.com
Auto delete date 06/29/2007 12:00 AM
Deletion reminder date 06/26/2007 11:59 PM
Date created 05/01/2006 11:19 AM
Last updated 06/15/2007 09:52 AM by Bill

Files [Add - Sort]

☐	File name	Description	Date Created	Size
☐	Tax Forms 2005.pdf	Tax forms	05/01/2006 11:19 AM	51.6 KB
☐	Stocks and Bonds traded in 2005.xls	My portfolio transactions	05/01/2006 11:19 AM	33.7 KB
☐	Estate plan and Living Will.doc	Estate plannning documents	05/01/2006 11:19 AM	313.0 KB
☐	Schwab account.pdf		05/10/2007 01:43 PM	218.6 KB
☐	401K performance.pdf		05/10/2007 01:43 PM	221.5 KB
☐	safe-deposit-box-contents.doc		05/10/2007 01:44 PM	4.2 MB
☐	tax-preparation-software.exe		05/10/2007 01:44 PM	75.9 MB
			Total:	**80.9 MB**

Deliveries

Delivery Name	Recipients	Date Available	Date Expires
For my accountant	bho@biscom.com	05/01/2006 01:11 PM	
Secure delivery of package: Financial information	bho@biscom.com	05/01/2006 11:21 AM	

Figure 11: Viewing package page

Updating package metadata

1. To update package metadata, click the **Edit** link next to the Package Information header at the top of the Viewing Package page (Figure 11).
2. Enter or modify any of the existing metadata and click the Update button to save your changes, or click the Cancel button to cancel the action.

Viewing package history

1. To view the transactions associated with the package, click the **History** link next to the Package Information header at the top of the page (Figure 11).
2. On the Package Activity page, you can choose the level of activity detail by selecting any of the following links: Critical, Major, Standard, Detail, or Most Detail.

Deleting the package

1. To delete a package, click the **Delete package** link next to the Package Information header at the top of the page (Figure 11).
2. You will be asked to confirm the deletion

> ***Note****: If any deliveries that are currently active or will be active in the future, Biscom Delivery Server will warn you that active deliveries exist and will be deleted along with the package.*

3. Click the **Delete** button to delete the package, or click the **Cancel** button to cancel the deletion.

Automatic Package Deletion

1. If your system administrator enables automatic package deletion, the system will assign a deletion date. The deletion date is determined by the default number of days defined by the system administrator and the date and time you created the package. For example, if the administrator defined 10 days as the automatic deletion date, then a package you created on May 1 will automatically be deleted on May 11.
2. If enabled, a reminder email will be sent to all package owners and senders a number of days (also defined by the administrator) before the package will be deleted.
3. Certain users can be granted override permission – these users are defined by the system administrator. Users with override permission are allowed to change the auto deletion date and reminder date, or even remove the dates altogether. Removing the dates has the effect of making a package perpetual – it can only be deleted manually by an owner.

> ***Note:*** *When a package is deleted, all deliveries, replies, and files associated with the package and deliveries will also be deleted. Recipients will no longer see the deliveries in their Received Deliveries listing, and links in any email notifications will no longer be valid.*

Adding files to the package

1. To add new files to the package, click the **Add** link next to the Files header (Figure 11).
2. Enter a specific file location in the text box or click the **Browse** button to browse your system and select the file you want to include in the package. Add an optional description for each file selected.
3. If the file name to upload conflicts with an existing file in the package, the file will be created and will have the same name as the existing file. If you want to overwrite the existing file, check the Overwrite Existing File(s) checkbox and the uploaded file will replace the existing file.
4. Click the **Add** button to upload the files or click the **Cancel** button to cancel the action.
5. After the files are uploaded, you will be returned to the Viewing Packages page (Figure 11). To add more files, click the **Add** link next to the Files section again and follow the previous steps 2 through 4. There is no limit to the number of files you can upload.

Editing file details

1. To edit an existing file name or description, click the Edit icon to the right of the file.
2. Enter a new file name or description and click the **Update** button to save your changes, or click the Cancel button to cancel the action.

> ***Note****: You cannot change the actual file – you need to upload a new file and overwrite the existing file or delete the file and add the new file.*

Deleting files from a package

1. Select the files you want to delete by selecting the checkboxes next to the files to delete, and then clicking the **Delete** button.
2. You will be asked to confirm the deletion of the file or files. Click the **Yes** button to delete the files, or click the **No** button to cancel the delete action.

> ***Note**: You must be an owner of the package to delete files. Package senders cannot delete files and the delete button does not appear for senders.*

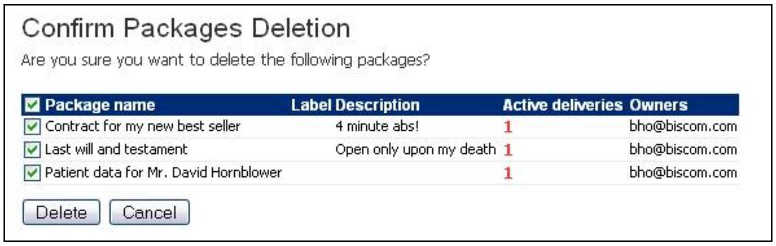
Deleting Multiple Packages

If the system administrator enables multiple package deletion, the package list page will display checkboxes next to the packages that you own. If you only have permission to send a package, the checkbox will be disabled and cannot be selected.

> ***Warning**: This is a dangerous operation – other owners may have deliveries that are active, and deleting the package will delete all active deliveries.*

To delete packages, follow these steps:

1. From the Package list page (Figure 9) select one or more packages from the list of packages.
2. Click the **Delete** button at the bottom of the listing.
3. The list of packages you want to delete will be displayed along with the number of active deliveries that exist for each package and the other owners of the package (Figure 12). You can deselect any packages in this list if you no longer wish to delete them.



Confirm Packages Deletion

Are you sure you want to delete the following packages?

☑ Package name	Label Description	Active deliveries	Owners
☑ Contract for my new best seller	4 minute abs!	1	bho@biscom.com
☑ Last will and testament	Open only upon my death	1	bho@biscom.com
☑ Patient data for Mr. David Hornblower		1	bho@biscom.com

Figure 12: Confirm Packages Deletion page

4. Click the **Delete** button to delete the selected packages.

Deliveries

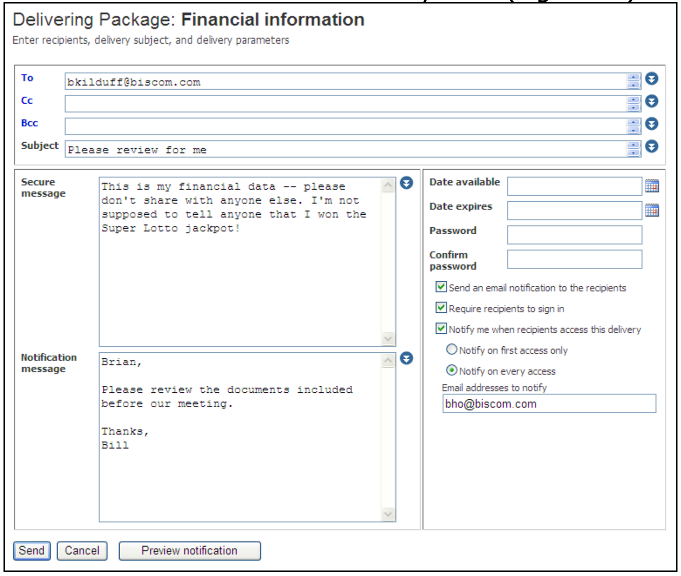
Packages that a Sender owns may be delivered to registered Biscom Delivery Server users who have the Recipient role or to any unregistered email address. Registered users who do not have the Recipient role cannot be added as delivery recipients.

Creating a New Delivery

1. Navigate to the Manage Packages page. From the home page, click the package icon or the link **Manage Packages**.

2. From the list of packages, click the email icon to the right of the package name, or open the package by clicking on the name of the package, and then click the **Deliver package now** button.

3. You will now see the Create Delivery form (Figure 13).



Delivering Package: **Financial information**

Enter recipients, delivery subject, and delivery parameters

To: bkilduff@biscom.com

Cc:

Bcc:

Subject: Please review for me

Secure message:

```
This is my financial data -- please
don't share with anyone else. I'm not
supposed to tell anyone that I won the
Super Lotto jackpot!
```

Notification message:

```
Brian,

Please review the documents included
before our meeting.

Thanks,
Bill
```

Date available:

Date expires:

Password:

Confirm password:

☑ Send an email notification to the recipients

☑ Require recipients to sign in

☑ Notify me when recipients access this delivery

  ○ Notify on first access only

  ● Notify on every access

Email addresses to notify: bho@biscom.com

Figure 13: Create delivery form

4. Enter the delivery information as outlined in the following table:

To, Cc, Bcc	Enter one or more recipients in the To, Cc, or Bcc field. Separate multiple recipients by semicolons or commas or enter addresses on separate lines. Alternatively, you can click the **To**, **Cc**, or **Bcc** labels to open your private contacts list. You can select recipients from your list and insert them into the To, Cc, or Bcc fields. ***Note:*** *Recipients in the To and Cc fields will be able to see the other To and Cc recipients.* *Recipients in the Bcc field will be able to see the To and Cc recipients, but will not be able to see other Bcc recipients. To and Cc recipients will not see any Bcc recipients.*
Subject	Text entered in the Subject text box will be the subject line of the email notification sent to the recipients. This field is pre-filled with the name of the package you are delivering. You may change this or leave default text, but this field cannot be empty.

Secure message	Enter an optional secure message in the Secure Message text box. This message is not sent in the notification email; recipients must sign in and view the delivery to see the secure message.
Notification message	Enter an email notification message for the recipients. A default notification message may already exist. You can enter a new message or update the existing message. The contents of this message box will be sent via non-secure email to the recipients. ***Note**: The notification email message will contain a URL will allow recipients to open the delivery by clicking the link.*
Date available	You may optionally schedule a delivery to be available at a certain date and time. To do so, enter a date that the delivery should first be available in the following format: MM/DD/YYYY HH:MM AM|PM, for example: **05/26/2005 12:49 PM**. If no date is entered, the current date and time are used as the default date. If the date entered is a future date or time, the delivery notification email will not be sent out until the specified date and time are reached.
Date expires	You may optionally schedule a delivery to expire at a certain date or time. To do so, enter a date that the delivery should no longer be available using the format shown above. If no date is entered, the delivery will never expire. Once a delivery has expired, a recipient will no longer be able to access the delivery using the email notification link, and the delivery will no longer appear in the recipient's list of received deliveries. ***Note**: An administrator may set an automatic expiration date; if so, the delivery expiration field will contain the default expiration date.*
Password / Confirm password	You may optionally password protect the specific delivery. Enter a password in both the Password and Confirm password fields. If a password is entered, the recipient will be asked to supply the correct password before being allowed to view the delivery. If the sender creates a no sign-in delivery (see below), this password is still required to view the delivery, even though the user will not need to register or sign in to his or her account. ***Note**: We do not recommend that you include the password in the delivery notification message. The password should be conveyed to your recipients through another channel if possible.*

Email notification checkbox	A notification email will be sent by default unless the checkbox is deselected. If you choose not to send a notification email, the recipients may still access the delivery and the package when they sign into the system. ***Note**: If you deselect this checkbox, the recipients will not see any text you may have entered into the Notification message box since they will not be receiving a notification email.*
Recipient sign-in checkbox	By default, recipients are required to sign in to view deliveries. You may, however, deliver a package without requiring users to sign in. If you uncheck the checkbox *Require recipients to sign in*, unregistered users will not be required to register, and registered users will not have to authenticate themselves to view the delivery. ***Note**: Anyone who receives the notification email with the embedded link to the delivery (through either direct email or a forwarded email message) can view the package.*
Notify me checkbox	If you want to be notified via email when a recipient accesses your delivery, select the *Notify me when recipients access this delivery* checkbox. Select the appropriate radio button to request to be notified the first time a recipient accesses the delivery or every time a recipient accesses the delivery. Enter the email addresses to notify when recipients access the delivery. The creator of the express delivery will be automatically populated in this field, but the user may be removed and other email addresses entered. Email addresses entered do not need to be Biscom Delivery Server users.

5. To preview the delivery email notification as it will appear to a recipient, click the **Preview notification** button at the bottom of the page. A new window will appear, displaying the delivery and the URL that is associated with the delivery.

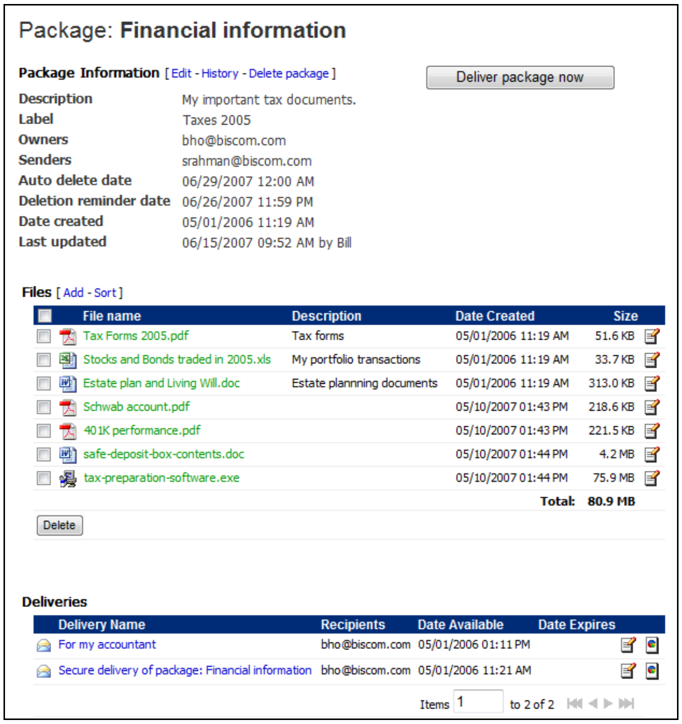
> ***Note**: This URL is not the actual URL that the recipients will see – it is only an example. Each recipient will receive a unique URL in his or her email notification. Also, there may be additional text in the email which is a permanent footer defined by the system administrator. This cannot be modified or deleted by the sender.*

6. When you are satisfied with the delivery, click the **Send** button to deliver the package.

Viewing an Existing Delivery

Deliveries are associated with a package. To view an existing delivery, open the package.

1. From the Home page, click the package icon or the **Manage Packages** link. The Viewing Package page appears (Figure 14). At the bottom of the page, you will see all the deliveries associated with the package.



Package: **Financial information**

Package Information [Edit - History - Delete package]

Description	My important tax documents.
Label	Taxes 2005
Owners	bho@biscom.com
Senders	srahman@biscom.com
Auto delete date	06/29/2007 12:00 AM
Deletion reminder date	06/26/2007 11:59 PM
Date created	05/01/2006 11:19 AM
Last updated	06/15/2007 09:52 AM by Bill

Files [Add - Sort]

☐	File name	Description	Date Created	Size
☐	Tax Forms 2005.pdf	Tax forms	05/01/2006 11:19 AM	51.6 KB
☐	Stocks and Bonds traded in 2005.xls	My portfolio transactions	05/01/2006 11:19 AM	33.7 KB
☐	Estate plan and Living Will.doc	Estate plannning documents	05/01/2006 11:19 AM	313.0 KB
☐	Schwab account.pdf		05/10/2007 01:43 PM	218.6 KB
☐	401K performance.pdf		05/10/2007 01:43 PM	221.5 KB
☐	safe-deposit-box-contents.doc		05/10/2007 01:44 PM	4.2 MB
☐	tax-preparation-software.exe		05/10/2007 01:44 PM	75.9 MB
			Total:	**80.9 MB**

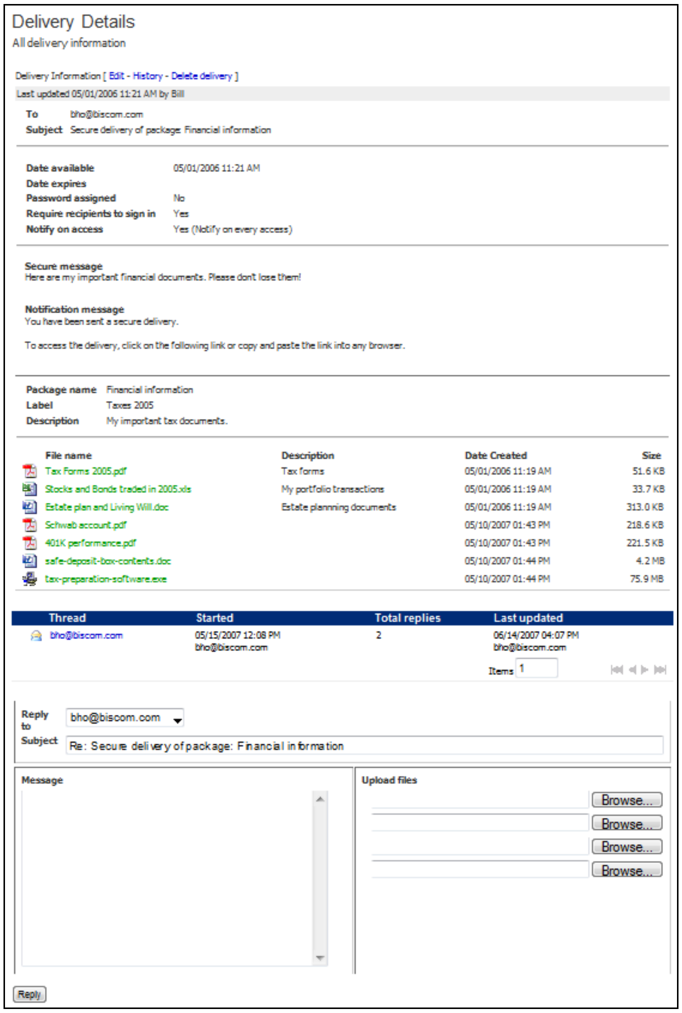
Deliveries

Delivery Name	Recipients	Date Available	Date Expires
For my accountant	bho@biscom.com	05/01/2006 01:11 PM	
Secure delivery of package: Financial information	bho@biscom.com	05/01/2006 11:21 AM	

Items 1 to 2 of 2

Figure 14: Viewing Package page

5. To view the delivery, click the delivery name. You will now see the delivery details (Figure 15) which include the delivery metadata, the secure message, the notification message, delivery parameters, and package metadata and files that are associated with the delivery.



Delivery Details

All delivery information

Delivery Information [Edit - History - Delete delivery]

Last updated 05/01/2006 11:21 AM by Bill

To bho@biscom.com

Subject Secure delivery of package: Financial information

Date available	05/01/2006 11:21 AM
Date expires	
Password assigned	No
Require recipients to sign in	Yes
Notify on access	Yes (Notify on every access)

Secure message
Here are my important financial documents. Please dont lose them!

Notification message
You have been sent a secure delivery.

To access the delivery, click on the following link or copy and paste the link into any browser.

Package name	Financial information
Label	Taxes 2005
Description	My important tax documents.

File name	Description	Date Created	Size
Tax Forms 2005.pdf	Tax forms	05/01/2006 11:19 AM	51.6 KB
Stocks and Bonds traded in 2005.xls	My portfolio transactions	05/01/2006 11:19 AM	33.7 KB
Estate plan and Living Will.doc	Estate planning documents	05/01/2006 11:19 AM	313.0 KB
Schwab account.pdf		05/10/2007 01:43 PM	218.6 KB
401K performance.pdf		05/10/2007 01:43 PM	221.5 KB
safe-deposit-box-contents.doc		05/10/2007 01:44 PM	4.2 MB
tax-preparation-software.exe		05/10/2007 01:44 PM	75.9 MB

Thread	Started	Total replies	Last updated
bho@biscom.com	05/15/2007 12:08 PM bho@biscom.com	2	06/14/2007 04:07 PM bho@biscom.com

Items 1

Reply to bho@biscom.com

Subject Re: Secure delivery of package: Financial information

Figure 15: Delivery details

Replying to a Recipient

Senders can update individual recipients with additional messages or files without affecting other recipients. Senders can create “threads” to recipients. When a thread exists for a recipient, it appears in the threads listing with the recipient as the thread name. When new replies are created, the system sends an email notification to the recipient of the reply with an embedded link. The link will send the user directly to the reply.

For the recipient’s point of view, see the section on **Receiving Deliveries** for details on recipients replying to deliveries.

To create a new thread:

1. Select the recipient in the *Reply to* drop down box.

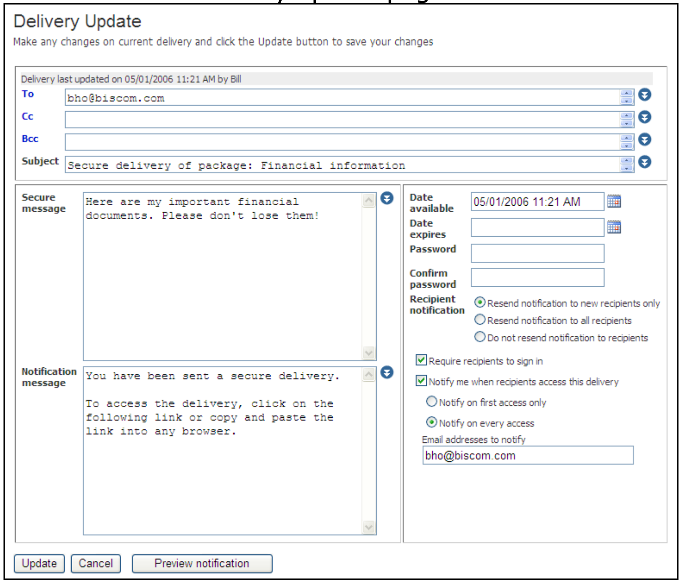
2. Enter a subject of the thread. This subject will be used as the subject of the email notification sent to the recipient.
3. Optionally enter a message in the *Message* field.
4. Optionally upload files. These files are only accessible by the recipient selected and are not available to other recipients of the delivery.
5. Click the *Reply* button to send the reply.

To reply to an existing thread:

1. Click the thread name you want to reply to.
2. A new subject, message, and files can be created and sent to the selected recipient.
3. Click the *Reply* button to send the reply.

Modifying an Existing Delivery

1. To modify a delivery, click the **Edit** link next to the Delivery Information header on the Delivery Details page or, if you are on the Viewing Package page, you can click the Edit icon 📝 next to the delivery.
2. You will see the delivery update page.



Delivery Update

Make any changes on current delivery and click the Update button to save your changes

Delivery last updated on 05/01/2006 11:21 AM by Bill

To: bho@biscom.com

Cc:

Bcc:

Subject: Secure delivery of package: Financial information

Secure message: Here are my important financial documents. Please don't lose them!

Notification message: You have been sent a secure delivery.

To access the delivery, click on the following link or copy and paste the link into any browser.

Date available: 05/01/2006 11:21 AM

Date expires:

Password:

Confirm password:

Recipient notification:

● Resend notification to new recipients only

○ Resend notification to all recipients

○ Do not resend notification to recipients

☑ Require recipients to sign in

☑ Notify me when recipients access this delivery

○ Notify on first access only

● Notify on every access

Email addresses to notify: bho@biscom.com

Figure 16: Delivery update

3. If a password has been set for the delivery, the Password and Confirm password fields will be filled with asterisks. The number of asterisks will not necessarily match the length of the actual password. To update the password, enter a new password in the Password box, and re-enter the password in the Confirm password box. To remove the password, delete the asterisks in both the Password and Confirm password fields.
4. You can update any of the information on the delivery. If a new recipient is added to the delivery, the new recipients will receive a notification email by default. This can be changed by selecting *Resend notification to all recipients* to send the notification to new and existing recipients, or selecting *Do not resend notification to recipients*, which will not send notifications to either new or existing recipients. Recipients can

still use their old notification email to access the delivery, but some delivery parameters may have changed since the last time they opened it.

5. If you elect to resend a notification, you may preview the email by clicking the **Preview Notification** button.
6. If you do not want to save any changes or resend the notification, click the **Cancel** button.

Deleting an Existing Delivery

1. From the Delivery Details page (Figure 15), click the **Delete Delivery** link.
2. You will be taken to the Confirm Delivery Deletion page. Click the Delete button to delete the delivery or Cancel to cancel deleting the delivery. Once deleted, recipients who click on their delivery notification link will no longer have access to the delivery or the package. Also, if a recipient is logged on to the Biscom Delivery Server application, he will no longer see the delivery in his list of received deliveries.

Express Deliveries

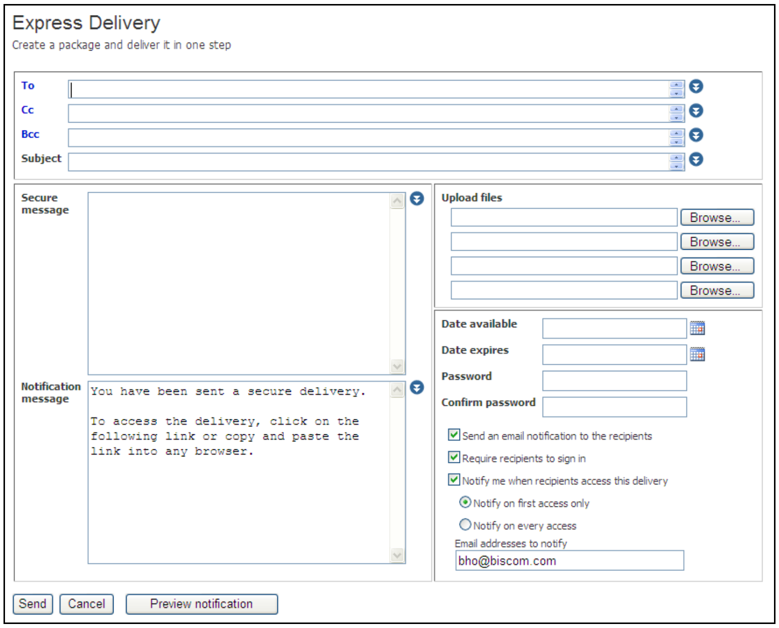
Standard deliveries are created from an existing package – this is a two-step process: create the package and save it, and then create the delivery. In some cases, such as a one-time delivery, a Sender may want to minimize the steps required to send a delivery by creating an express delivery.

The main difference between the two types of deliveries is the package metadata. An express delivery will create a standard package but will use several default values for package metadata and cannot be changed initially by the sender when first creating the package. For example, the express delivery subject will be used as the package name, the package description will be empty, and the sole owner of the package will be the user who created the express delivery.

To create an express delivery, follow these steps:

1. From the Home page, click the express delivery icon or the **Create an Express Delivery** link.

2. The Express Delivery creation page appears (Figure 17).


Express Delivery
Create a package and deliver it in one step
To
Cc
Bcc
Subject
Secure message
Upload files
Browse...
Browse...
Browse...
Browse...
Date available
Date expires
Password
Confirm password
Send
Cancel
Preview notification

Notification message: You have been sent a secure delivery.

To access the delivery, click on the following link or copy and paste the link into any browser.

☑ Send an email notification to the recipients
☑ Require recipients to sign in
☑ Notify me when recipients access this delivery
● Notify on first access only
○ Notify on every access

Email addresses to notify: bho@biscom.com

Figure 17: Express delivery

3. Enter the delivery information as outlined in the following table:

To, Cc, Bcc	Enter one or more recipients in the To, Cc, or Bcc field. Separate multiple recipients by semicolons or commas or enter addresses on separate lines. Alternatively, you can click the **To**, **Cc**, or **Bcc** labels to open your private contacts list. You can select recipients from your list and insert them into the To, Cc, or Bcc fields. ***Note:*** *Recipients in the To and Cc fields will be able to see the other To and Cc recipients.* *Recipients in the Bcc field will be able to see the To and Cc recipients, but will not be able to see other Bcc recipients. To and Cc recipients will not see any Bcc recipients.*
Subject	Enter the Subject that will appear as the subject of the notification email.
Secure message	Enter a message in the Secure Message text box. Any text entered in this text box will not be part of the notification email, but will be accessible when the recipient logs on to view the delivery.

Notification message	Optionally enter text in the Notification message text box. A default notification message may already exist. You can enter a new message or update the existing message. The contents of this message box will be sent via non-secure email to the recipients. ***Note**: The notification email message will contain a URL which will allow recipients to open the delivery by clicking the link.*
Upload files	For each file you want to include in the package, enter a specific file location in the text box or click the **Browse** button to browse your system and select the file.
Date available	You may optionally schedule a delivery to be available at a certain date and time. To do so, enter a date that the delivery should first be available in the following format: MM/DD/YYYY HH:MM AM|PM, for example: **05/26/2005 12:49 PM**. If no date is entered, the current date and time are used as the default date. If the date entered is a future date or time, the delivery notification email will not be sent out until the specified date and time are reached.
Date expires	You may optionally schedule a delivery to expire at a certain date or time. To do so, enter a date that the delivery should no longer be available using the format shown above. If no date is entered, the delivery will never expire. Once a delivery has expired, a recipient will no longer be able to access the delivery using the email notification link, and the delivery will no longer appear in the recipient's list of received deliveries. ***Note**: An administrator may set an automatic expiration date; if so, the delivery expiration field will contain the default expiration date.*
Password	Optionally enter a password that is specific to this delivery. We recommend you contact the recipients and inform them of the password outside the BDS system.
Confirm password	If a password was entered in the previous text box, re-enter the password to verify it.
Email notification checkbox	A notification email will be sent by default unless the checkbox is deselected. If you choose not to send a notification email, the recipients may still access the delivery and the package when they sign into the system.

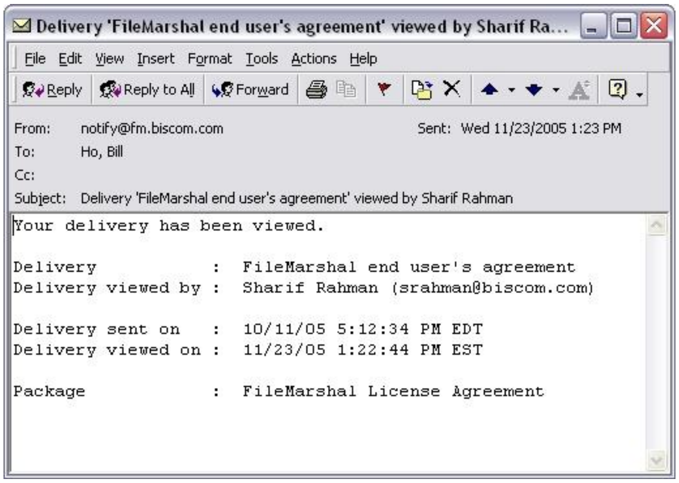
Recipient sign-in checkbox	By default, recipients are required to sign in to view deliveries. You may, however, deliver a package without requiring users to sign in. If you uncheck the checkbox *Require recipients to sign in*, unregistered users will not be required to register, and registered users will not have to authenticate themselves to view the delivery. ***Note:*** *Anyone who receives the notification email with the embedded link to the delivery (through either direct email or a forwarded email message) can view the package.*
Notify me checkbox	If you want to be notified via email when a recipient accesses your delivery, select the *Notify me when recipients access this delivery* checkbox. Select the appropriate radio button to request to be notified the first time a recipient accesses the delivery or every time a recipient accesses the delivery. Enter the email addresses to notify when recipients access the delivery. The creator of the express delivery will be automatically populated in this field, but the user may be removed and other email addresses entered. Email addresses entered do not need to be Biscom Delivery Server users.

4. Preview the notification email that the recipient will see by clicking the **Preview Notification** button, or send the delivery by clicking the **Send** button.

Express deliveries and the package that is created automatically can be modified like any other package or delivery. Go through the Package Manager to view, modify, or delete the package and express delivery.

Delivery Access Notifications

When a recipient views a delivery, Biscom Delivery Server tracks the action. If access notification was turned on by the sender, an email will be sent to the notification list (see **Notify me checkbox** on p. 23). The delivery access notification contains details such as the delivery name and package name, who accessed it, when the delivery was sent out, and when it was opened (Figure 18).


Delivery 'FileMarshal end user's agreement' viewed by Sharif Ra...
File Edit View Insert Format Tools Actions Help
Reply
Reply to All
Forward

From: notify@fm.biscom.com
Sent: Wed 11/23/2005 1:23 PM
To: Ho, Bill
Cc:
Subject: Delivery 'FileMarshal end user's agreement' viewed by Sharif Rahman

```
Your delivery has been viewed.

Delivery           :  FileMarshal end user's agreement
Delivery viewed by :  Sharif Rahman (srahman@biscom.com)

Delivery sent on   :  10/11/05 5:12:34 PM EDT
Delivery viewed on :  11/23/05 1:22:44 PM EST

Package            :  FileMarshal License Agreement
```

Figure 18: Delivery view notification email

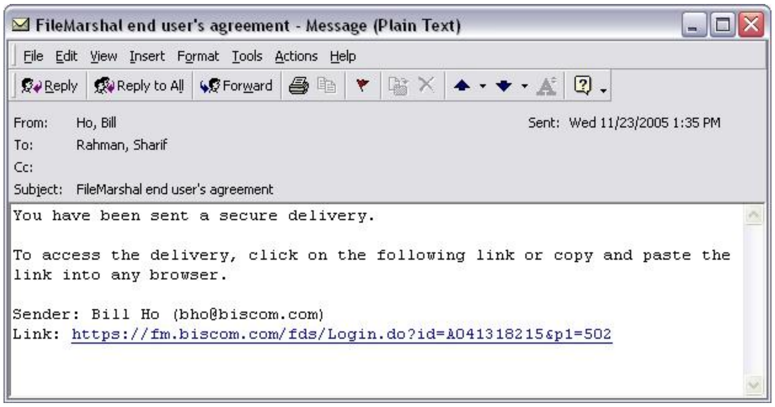
Section 5: Receiving Deliveries

Accessing and Viewing Deliveries

When users with the Recipient role sign into the Biscom Delivery Server, they will be able to view all the deliveries they have been sent that are active and have not expired.

***Note**: When a delivery expires, is deleted, or is retracted by the sender, it will not appear in the recipient's list of deliveries.*

Users may also receive an email notification from the Biscom Delivery Server application with a URL embedded in the body of the email (Figure 19). This URL provides the user with direct access to the delivery and package contents.



From: Ho, Bill
Sent: Wed 11/23/2005 1:35 PM
To: Rahman, Sharif
Cc:
Subject: FileMarshal end user's agreement

```
You have been sent a secure delivery.

To access the delivery, click on the following link or copy and paste the
link into any browser.

Sender: Bill Ho (bho@biscom.com)
Link: https://fm.biscom.com/fds/Login.do?id=A041318215&p1=502
```

Figure 19: Delivery notification email

If the recipient is already a registered user, and if the Sender required recipients to sign in, the URL directs the recipient to the sign in page (see **Recipient sign-in checkbox** on p. 23).

If the sender did NOT require recipients to sign in, then anyone who received the notification email (either directly or as a forwarded message) can access the delivery through the URL.

Senders may choose not to send a delivery notification to recipients. In this case, recipients must sign in to the Biscom Delivery Server application and view their received deliveries.

Viewing Deliveries

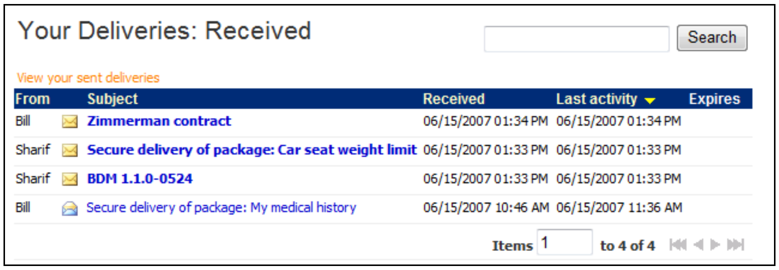
Deliveries are simply conduits to a package. Packages contain the actual files that a user may download. To retrieve files from a delivery, follow these steps:

1. From the notification email, click the URL at the bottom of the message, or go directly to the Biscom Delivery Server sign in page.
2. Enter your user name and password. If you are signing in through an email notification, go to step 4.

3. From the Home page, click the View Deliveries You Have Received icon or click the **View Deliveries You Have Received** link.

4. You will see a list of all the deliveries you have received (Figure 20). Deliveries that are new and have not been viewed appear in bold text. Deliveries that you have already viewed are in normal text. Select the delivery you wish to view by clicking the name of the delivery.

   The *Received* column shows the date the delivery was first received. The *Last activity* column shows the date that some activity occurred in the delivery, such as a reply to the delivery. The closed mail icon also indicates an unread delivery or an unread reply.

   Your Deliveries: Received

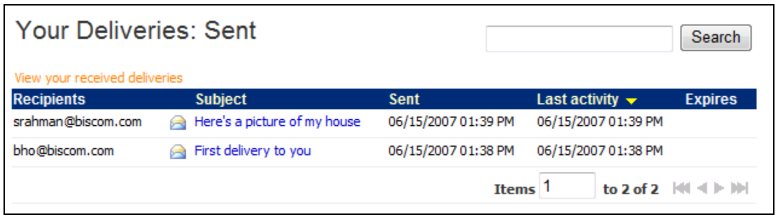
   View your sent deliveries

From	Subject	Received	Last activity	Expires
Bill	**Zimmerman contract**	06/15/2007 01:34 PM	06/15/2007 01:34 PM	
Sharif	**Secure delivery of package: Car seat weight limit**	06/15/2007 01:33 PM	06/15/2007 01:33 PM	
Sharif	**BDM 1.1.0-0524**	06/15/2007 01:33 PM	06/15/2007 01:33 PM	
Bill	Secure delivery of package: My medical history	06/15/2007 10:46 AM	06/15/2007 11:36 AM	

   Items 1 to 4 of 4

   Figure 20: Deliveries you have received

   If you have the Sender role assigned, you will see a link above the list of received deliveries: *View your sent deliveries.* This list (Figure 21) will show the deliveries you sent out to other recipients. This is useful in seeing if any recipients have replied to your deliveries, and it is sorted (by default) based on the last activity date, which could be a new reply.

   Your Deliveries: Sent

   View your received deliveries

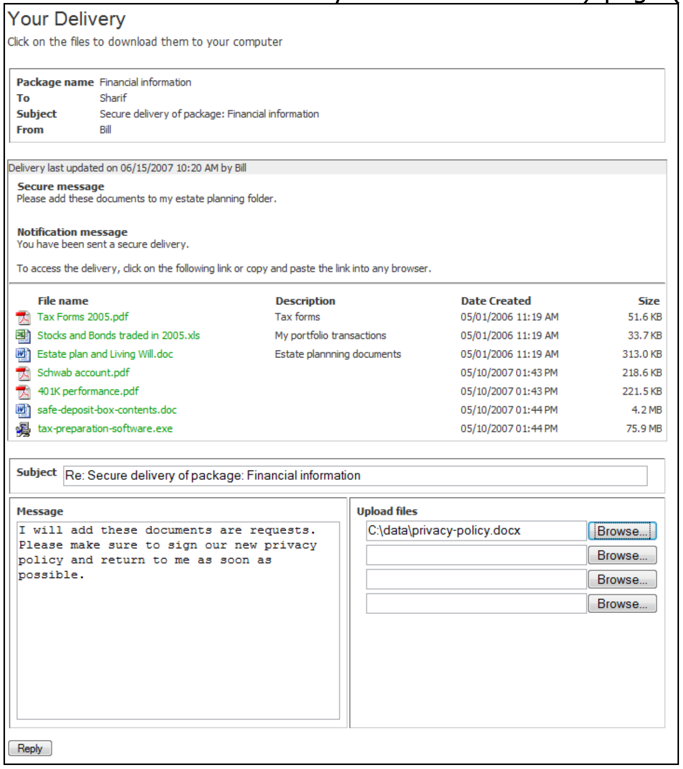
Recipients	Subject	Sent	Last activity	Expires
srahman@biscom.com	Here's a picture of my house	06/15/2007 01:39 PM	06/15/2007 01:39 PM	
bho@biscom.com	First delivery to you	06/15/2007 01:38 PM	06/15/2007 01:38 PM	

   Items 1 to 2 of 2

   Figure 21: Deliveries you have sent

5. If your delivery is password protected, you will be prompted to enter the password. This password is specific to the delivery and is assigned by the sender. If you do not have the password, contact the sender.

6. You will now see the delivery on the *Your Delivery* page (Figure 22).



Your Delivery

Click on the files to download them to your computer

Package name	Financial information
To	Sharif
Subject	Secure delivery of package: Financial information
From	Bill

Delivery last updated on 06/15/2007 10:20 AM by Bill

Secure message
Please add these documents to my estate planning folder.

Notification message
You have been sent a secure delivery.

To access the delivery, click on the following link or copy and paste the link into any browser.

File name	Description	Date Created	Size
Tax Forms 2005.pdf	Tax forms	05/01/2006 11:19 AM	51.6 KB
Stocks and Bonds traded in 2005.xls	My portfolio transactions	05/01/2006 11:19 AM	33.7 KB
Estate plan and Living Will.doc	Estate plannning documents	05/01/2006 11:19 AM	313.0 KB
Schwab account.pdf		05/10/2007 01:43 PM	218.6 KB
401K performance.pdf		05/10/2007 01:43 PM	221.5 KB
safe-deposit-box-contents.doc		05/10/2007 01:44 PM	4.2 MB
tax-preparation-software.exe		05/10/2007 01:44 PM	75.9 MB

Subject Re: Secure delivery of package: Financial information

Message
I will add these documents are requests. Please make sure to sign our new privacy policy and return to me as soon as possible.

Upload files
C:\data\privacy-policy.docx

Figure 22: Viewing your delivery

You will see the delivery metadata such as the other recipients (this does not include Bcc recipients), the delivery name (subject of the delivery), the date you received it, the date it expires, and the sender. The secure delivery message and the notification message will also be displayed on this page. The delivery also contains the package that has the files you can download or view.

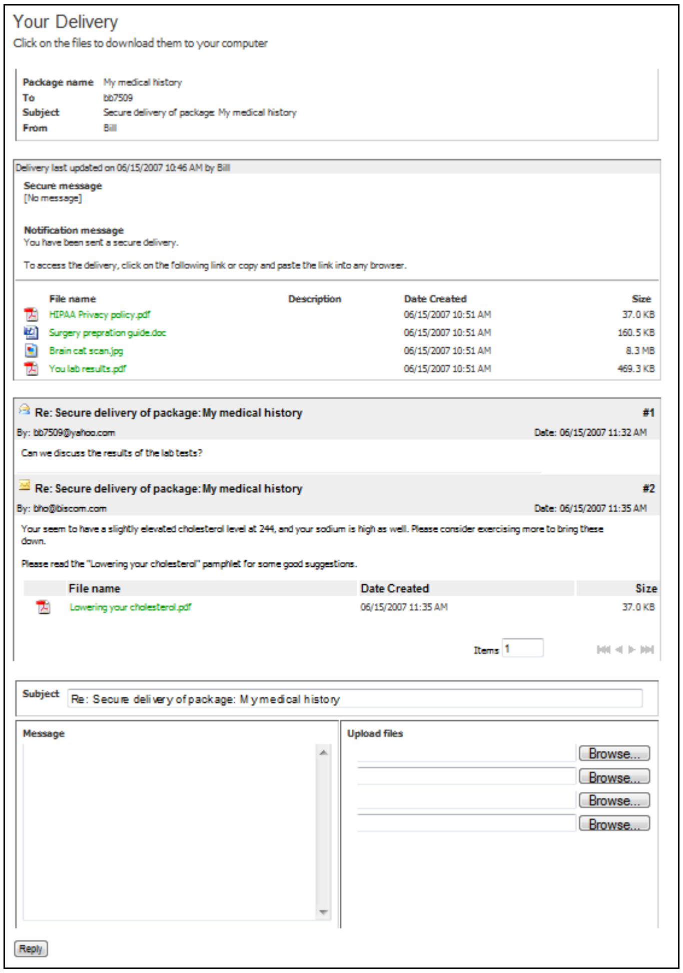
Downloading Files

When viewing a delivery, the list of files is located below the delivery information section. Clicking the filename will open a dialog box that provides you the option to open or save the file. Click each filename in turn that you would like to open or save.

Replying To Deliveries

Recipients of deliveries have the ability to reply to the sender. At the bottom of the delivery page, there is a form containing text fields to enter a reply subject, a reply message, and a number of file upload slots. The message and documents will be created as a new thread for the sender. Files attached to a reply are viewable by the sender as well as any other owner or sender of the package; other recipients, however, will not have access to the files uploaded through the reply form.

The system will send an email notification to the sender of the delivery that you have replied to the delivery. Senders can also reply back to individual recipients. If the sender replies back to you, a new reply entry with any attached files is added to the delivery (Figure 23). The files attached to the reply are only viewable by you – no other recipients will have access to files that are part of the reply.



Your Delivery

Click on the files to download them to your computer

Package name	My medical history
To	bb7509
Subject	Secure delivery of package: My medical history
From	Bill

Delivery last updated on 06/15/2007 10:46 AM by Bill

Secure message
[No message]

Notification message
You have been sent a secure delivery.

To access the delivery, click on the following link or copy and paste the link into any browser.

File name	Description	Date Created	Size
HIPAA Privacy policy.pdf		06/15/2007 10:51 AM	37.0 KB
Surgery prepration guide.doc		06/15/2007 10:51 AM	160.5 KB
Brain cat scan.jpg		06/15/2007 10:51 AM	8.3 MB
You lab results.pdf		06/15/2007 10:51 AM	469.3 KB

Re: Secure delivery of package: My medical history #1

By: bb7509@yahoo.com Date: 06/15/2007 11:32 AM

Can we discuss the results of the lab tests?

Re: Secure delivery of package: My medical history #2

By: bho@biscom.com Date: 06/15/2007 11:35 AM

Your seem to have a slightly elevated cholesterol level at 244, and your sodium is high as well. Please consider exercising more to bring these down.

Please read the "Lowering your cholesterol" pamphlet for some good suggestions.

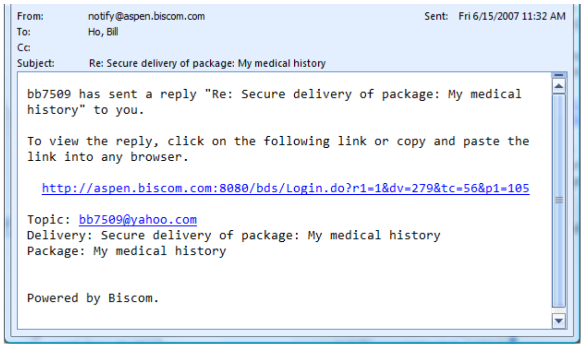
File name	Date Created	Size
Lowering your cholesterol.pdf	06/15/2007 11:35 AM	37.0 KB

Items 1

Subject: Re: Secure delivery of package: My medical history

Figure 23: Recipient delivery with 2 replies

You will receive an email notification that you have a new reply (Figure 24). An embedded link will bring you directly to the delivery and replies. Reply notification emails do not contain any part of the reply – the reply is only viewable once you have signed in and opened the delivery.


From: notify@aspen.biscom.com Sent: Fri 6/15/2007 11:32 AM
To: Ho, Bill
Cc:
Subject: Re: Secure delivery of package: My medical history

bb7509 has sent a reply "Re: Secure delivery of package: My medical history" to you.

To view the reply, click on the following link or copy and paste the link into any browser.

http://aspen.biscom.com:8080/bds/Login.do?r1=1&dv=279&tc=56&p1=105

Topic: bb7509@yahoo.com
Delivery: Secure delivery of package: My medical history
Package: My medical history

Powered by Biscom.

Figure 24: Email reply notification

***Note**: all owners and senders of a particular package have access to your replies. However, only the owners and senders who participate in the reply topic with you will receive email notifications of new replies.*

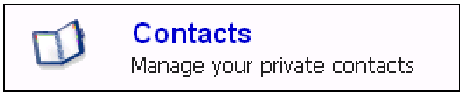
Section 6: Managing Contacts

Using Contacts

Each user can create a contacts list, which appears as a popup window containing a list of selectable contacts. When delivering a package, a Sender can click on one of the recipient labels (To, Cc, Bcc) and select recipients from his or her contact list. When creating or editing a package, clicking the Owner and Sender labels will open a popup window with a list of your contacts who are also registered users who have the Sender role assigned to them. Contacts who do not have the Sender role assigned to them will not appear in the list of contacts when you click the Sender label. (See **Senders** on p. 16.)

Viewing Contacts

To view contacts, click the Contacts link or icon in the application home page (Figure 25).

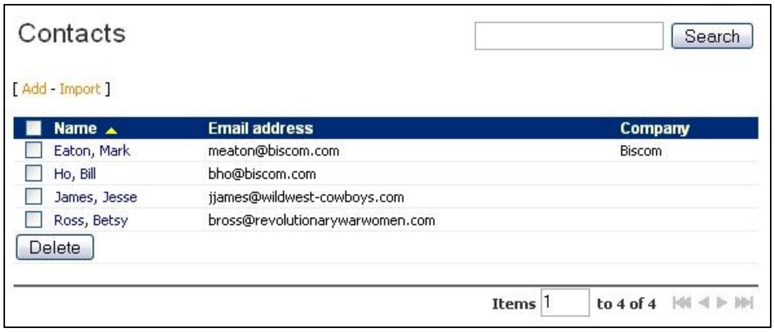


Contacts

Manage your private contacts

Figure 25: Contacts link

Your contacts will be listed in the Contacts list (Figure 26). You can search for your contacts based on email address, name, and company. Click one of the column headings to sort the contacts. Clicking the same column heading again will reverse the current sort order.



Contacts

[Add - Import]

☐	Name ▲	Email address	Company
☐	Eaton, Mark	meaton@biscom.com	Biscom
☐	Ho, Bill	bho@biscom.com	
☐	James, Jesse	jjames@wildwest-cowboys.com	
☐	Ross, Betsy	bross@revolutionarywarwomen.com	

Items 1 to 4 of 4

Figure 26: Contacts list

Creating a New Contact

1. Click the **Add** link at the top of your Contacts page to create a new contact.
2. Enter contact data on the Create New Contact page (Figure 27), which includes text boxes for personal and business address information, phone numbers, and notes.

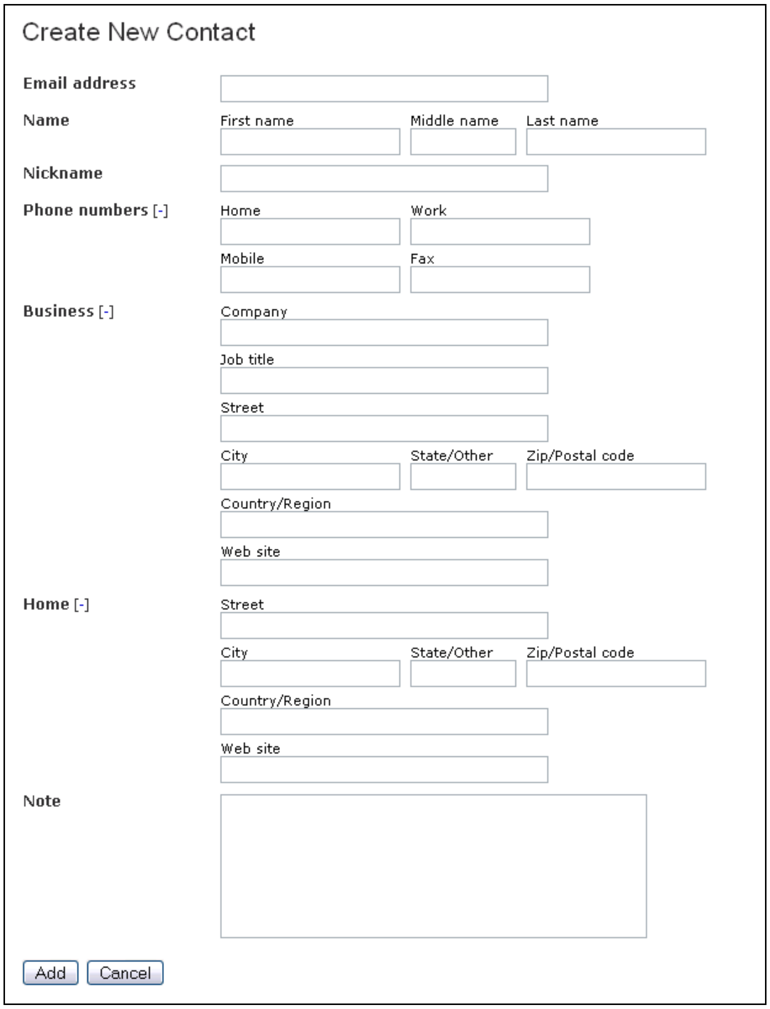
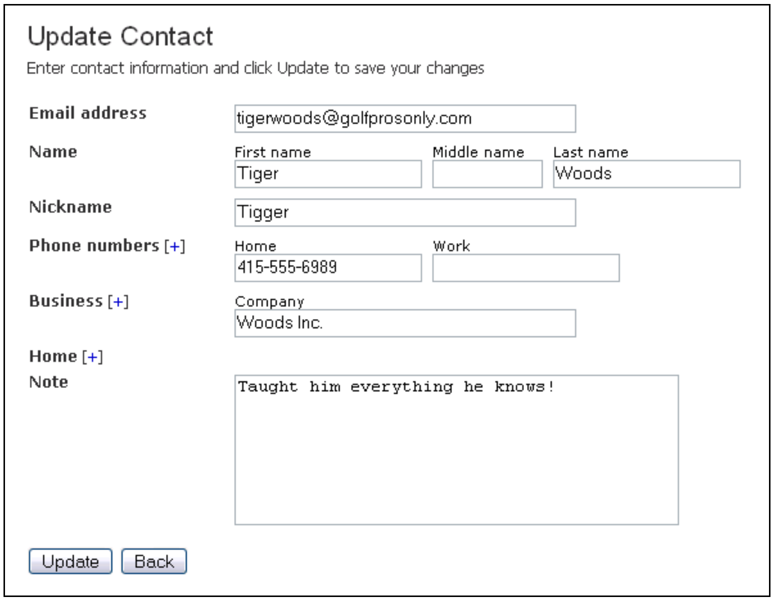

Create New Contact
Email address
Name
First name
Middle name
Last name
Nickname
Phone numbers [-]
Home
Work
Mobile
Fax
Business [-]
Company
Job title
Street
City
State/Other
Zip/Postal code
Country/Region
Web site
Home [-]
Street
City
State/Other
Zip/Postal code
Country/Region
Web site
Note
Add
Cancel

Figure 27: Create New Contact page

6. Click the **Add** button to save the contact's information to your contacts list.

Updating Contacts

1. From the Contacts list (Figure 26), click the contact name. The Update Contact page appears (Figure 28).
2. Enter new information or change existing information and click the **Update** button to save your changes.



Update Contact

Enter contact information and click Update to save your changes

Email address: tigerwoods@golfprosonly.com

Name: First name: Tiger; Middle name: ; Last name: Woods

Nickname: Tigger

Phone numbers [+]: Home: 415-555-6989; Work:

Business [+]: Company: Woods Inc.

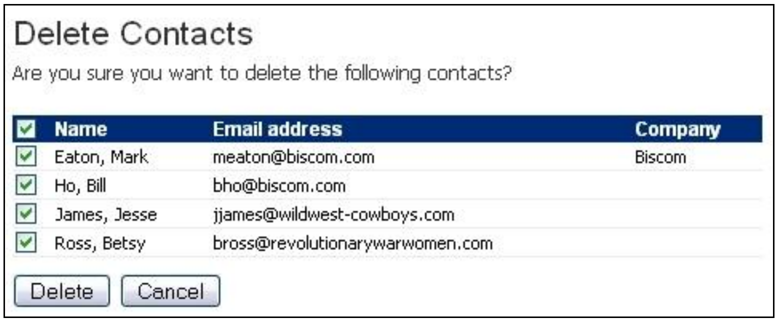
Home [+]

Note: Taught him everything he knows!

Figure 28: Update Contact page

Deleting Contacts

1. From the Contacts list (Figure 26), select the checkboxes next to each contact you wish to delete and click the **Delete** button.
2. You will be prompted to confirm the deletion of the selected contacts (Figure 29).



Delete Contacts

Are you sure you want to delete the following contacts?

☑	Name	Email address	Company
☑	Eaton, Mark	meaton@biscom.com	Biscom
☑	Ho, Bill	bho@biscom.com	
☑	James, Jesse	jjames@wildwest-cowboys.com	
☑	Ross, Betsy	bross@revolutionarywarwomen.com	

Figure 29: Delete Contacts confirmation

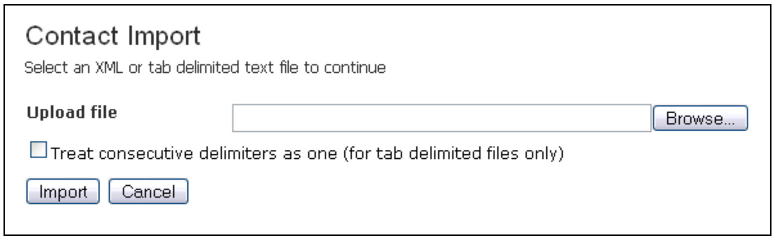
7. Click the **Delete** button to confirm the deletion or click the **Cancel** button to cancel the action.

Importing Contacts

You can import contacts from a CSV or XML file to facilitate entering large numbers of contacts.

1. To import contacts, click the Import link near the top of the Contacts list (Figure 26).

8. On the Contact Import page (Figure 30), click the Browse button to locate the file you want to import.



Contact Import

Select an XML or tab delimited text file to continue

Upload file

☐ Treat consecutive delimiters as one (for tab delimited files only)

Figure 30: Contact Import page

9. When importing a tab-delimited file, some users will insert additional tabs to visually improve the format of the data. If the CSV file contains additional tabs for formatting, select the checkbox *Treat consecutive delimiters as one*.

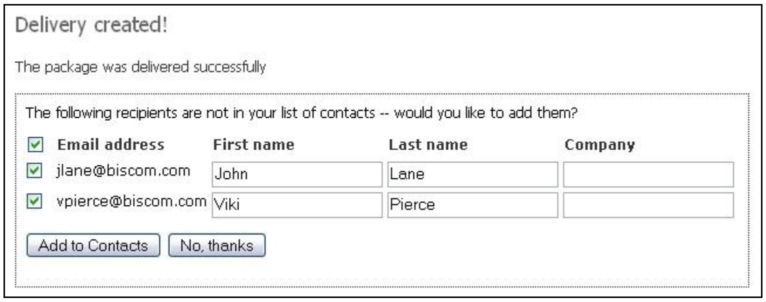
> ***Note**: This feature only works if all import fields contain text. If any field is not entered (left empty), the import will fail. We recommend you do not insert extra tabs in your import file. See the appendix for information on the file formats.*

10. Click the **Import** button to begin the import action.

Adding Contacts from a Delivery

When you create a new delivery, Biscom Delivery Server will check to see if any recipients are not in your contact list. If any new recipients are found, they will be listed in your Delivery confirmation message (Figure 31).

Click the checkbox next to a contact to deselect it. Click the **Add to Contacts** button to add the checked contacts your contacts list.



Delivery created!

The package was delivered successfully

The following recipients are not in your list of contacts -- would you like to add them?

☑ Email address	First name	Last name	Company
☑ jlane@biscom.com	John	Lane	
☑ vpierce@biscom.com	Viki	Pierce	

Figure 31: Adding contacts from a delivery

Section 7: Viewing Reports

Viewing Reports

Biscom Delivery Server records the transactions that occur in the application and can generate reports on Delivery activities, Package activity, and User activity. The reports available to you depend on the roles you have been assigned. For example, users with the Sender role will be able to view reports on packages and deliveries. Users with the Administrator role will be able to view additional reports on user activity.

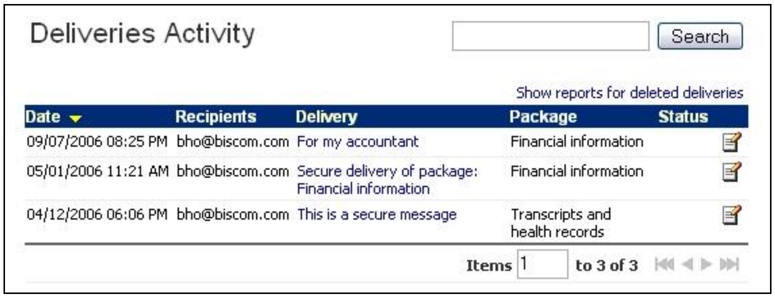
Role	Reports Available	Description
Senders	Deliveries	List of your deliveries sorted by delivery access date.
	Packages	List of packages for which you are a sender or owner.
Administrators	Users	List of all registered users, whether active, disabled, or with pending registration. Includes deleted users.

***Note**: If you are assigned the roles of both Sender and Administrator, then all three reports would be available to you.*

Viewing Deliveries

To view your list of deliveries, follow these steps:

1. From the home page, click the View Reports icon or click the **View Reports** link.
2. Next click the **Deliveries I've sent** link.
3. The Deliveries Activity list appears (Figure 32). This page lists your deliveries sorted by delivery access date in reverse chronological order. By default, deleted deliveries are not displayed.

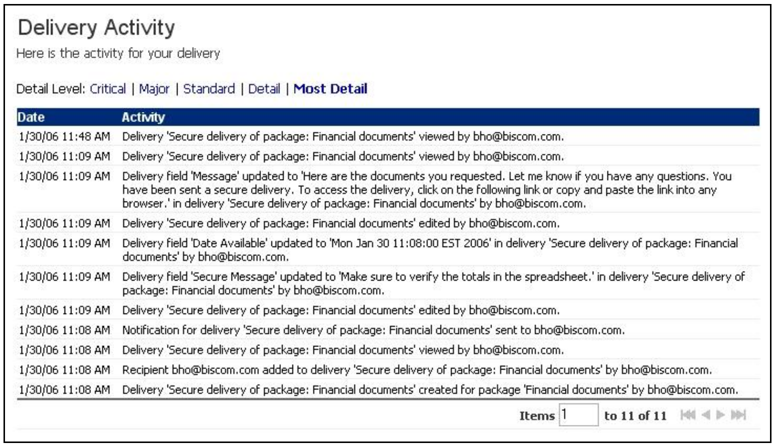


Date	Recipients	Delivery	Package	Status
09/07/2006 08:25 PM	bho@biscom.com	For my accountant	Financial information	
05/01/2006 11:21 AM	bho@biscom.com	Secure delivery of package: Financial information	Financial information	
04/12/2006 06:06 PM	bho@biscom.com	This is a secure message	Transcripts and health records	

Figure 32: Deliveries activity list

Note: *To include deleted deliveries, click the* **Show reports for deleted deliveries** *link. Deleted deliveries still maintain all transaction history.*

Note*: You can click the icon next to active deliveries to go to the delivery view page. Deleted deliveries are not editable and the view icon will not appear.*



Delivery Activity

Here is the activity for your delivery

Detail Level: Critical | Major | Standard | Detail | **Most Detail**

Date	Activity
1/30/06 11:48 AM	Delivery 'Secure delivery of package: Financial documents' viewed by bho@biscom.com.
1/30/06 11:09 AM	Delivery 'Secure delivery of package: Financial documents' viewed by bho@biscom.com.
1/30/06 11:09 AM	Delivery field 'Message' updated to 'Here are the documents you requested. Let me know if you have any questions. You have been sent a secure delivery. To access the delivery, click on the following link or copy and paste the link into any browser.' in delivery 'Secure delivery of package: Financial documents' by bho@biscom.com.
1/30/06 11:09 AM	Delivery 'Secure delivery of package: Financial documents' edited by bho@biscom.com.
1/30/06 11:09 AM	Delivery field 'Date Available' updated to 'Mon Jan 30 11:08:00 EST 2006' in delivery 'Secure delivery of package: Financial documents' by bho@biscom.com.
1/30/06 11:09 AM	Delivery field 'Secure Message' updated to 'Make sure to verify the totals in the spreadsheet.' in delivery 'Secure delivery of package: Financial documents' by bho@biscom.com.
1/30/06 11:09 AM	Delivery 'Secure delivery of package: Financial documents' edited by bho@biscom.com.
1/30/06 11:08 AM	Notification for delivery 'Secure delivery of package: Financial documents' sent to bho@biscom.com.
1/30/06 11:08 AM	Delivery 'Secure delivery of package: Financial documents' viewed by bho@biscom.com.
1/30/06 11:08 AM	Recipient bho@biscom.com added to delivery 'Secure delivery of package: Financial documents' by bho@biscom.com.
1/30/06 11:08 AM	Delivery 'Secure delivery of package: Financial documents' created for package 'Financial documents' by bho@biscom.com.

Figure 33: Delivery Activity report

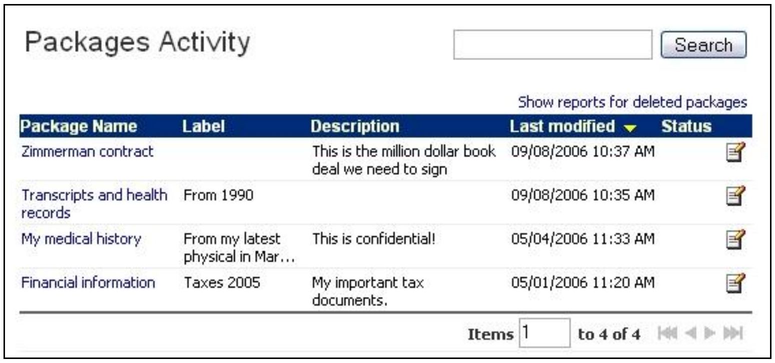
1. Click a delivery name to view the detailed delivery transactions sorted by date (Figure 33).
2. You can change the level of detail by clicking one of the five detail levels. From least detail to most detail, the levels are:
   - Critical
   - Major
   - Standard
   - Detail
   - Most Detail

   Critical and Major levels will only display the most significant transactions (if any). Detail and Most Detail will display more transactions. Most Detail is the default level for delivery activity.

Viewing Packages Activity

To view your list of deliveries, follow these steps:

11. From the home page, click the View Reports icon or click the **View Reports** link.
12. Next click the **Packages Activity** link.
13. The Packages Activity list appears (Figure 34). This page lists the packages that you own. By default, deleted packages are not displayed. Click the **Show reports for deleted packages** link to include deleted packages.



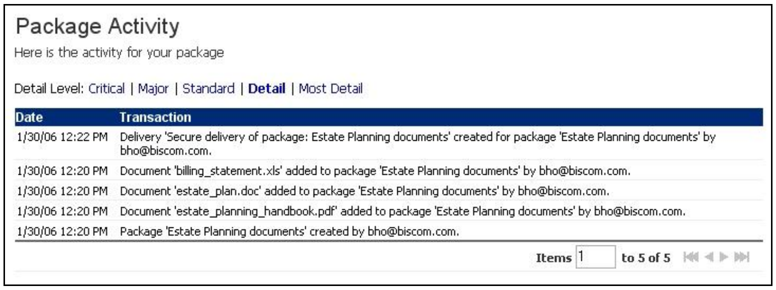
Packages Activity

Package Name	Label	Description	Last modified	Status
Zimmerman contract		This is the million dollar book deal we need to sign	09/08/2006 10:37 AM	
Transcripts and health records	From 1990		09/08/2006 10:35 AM	
My medical history	From my latest physical in Mar…	This is confidential!	05/04/2006 11:33 AM	
Financial information	Taxes 2005	My important tax documents.	05/01/2006 11:20 AM	

Figure 34: Packages Activity list

14. Click the edit icon to update the package immediately. Deleted packages are not editable and the edit icon will not appear.

    3. Click a package name to view the detailed package transactions. You will see the Package Activity report with the transactions sorted by transaction date (Figure 35).



Package Activity

Here is the activity for your package

Detail Level: Critical | Major | Standard | **Detail** | Most Detail

Date	Transaction
1/30/06 12:22 PM	Delivery 'Secure delivery of package: Estate Planning documents' created for package 'Estate Planning documents' by bho@biscom.com.
1/30/06 12:20 PM	Document 'billing_statement.xls' added to package 'Estate Planning documents' by bho@biscom.com.
1/30/06 12:20 PM	Document 'estate_plan.doc' added to package 'Estate Planning documents' by bho@biscom.com.
1/30/06 12:20 PM	Document 'estate_planning_handbook.pdf' added to package 'Estate Planning documents' by bho@biscom.com.
1/30/06 12:20 PM	Package 'Estate Planning documents' created by bho@biscom.com.

Figure 35: Package Activity report

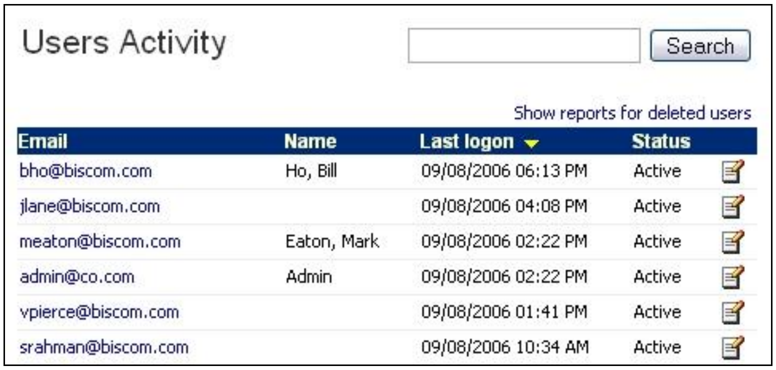
Viewing Users Activity

This report is available to those assigned an Administrator role.

1. From the home page, click the View Reports icon or click the **View Reports** link.

15. Next click the **Users Activity** link.

16. The Users Activity list appears (Figure 36). This page lists all registered users, sorted by default by the last time they logged onto the system. Users may be Active, Disabled (grayed out), or Pending Registration (green).



Users Activity

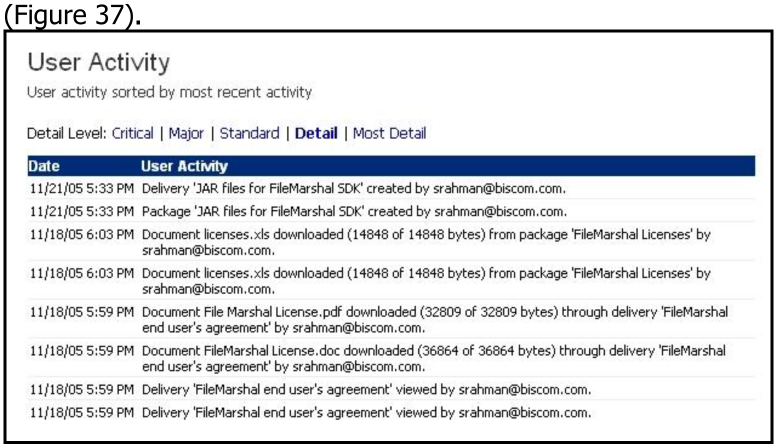
Show reports for deleted users

Email	Name	Last logon	Status	
bho@biscom.com	Ho, Bill	09/08/2006 06:13 PM	Active	📝
jlane@biscom.com		09/08/2006 04:08 PM	Active	📝
meaton@biscom.com	Eaton, Mark	09/08/2006 02:22 PM	Active	📝
admin@co.com	Admin	09/08/2006 02:22 PM	Active	📝
vpierce@biscom.com		09/08/2006 01:41 PM	Active	📝
srahman@biscom.com		09/08/2006 10:34 AM	Active	📝

Figure 36: Users Activity list

> ***Note:*** *To include deleted users, click the* ***Show reports for deleted users*** *link to include deleted users. Since a user may be deleted and another user created with the same email address, each deleted user's email address is followed by a unique string. This can help differentiate different deleted users with the same email address.*
>
> ***Note:*** *You can click the edit icon to go directly to the Update User form. This is not available for deleted users.*

17. To view a detailed user activity report, click a user's email address.
18. You will see the User Activity report with the transactions sorted by transaction date (Figure 37).



User Activity

User activity sorted by most recent activity

Detail Level: Critical | Major | Standard | **Detail** | Most Detail

Date	User Activity
11/21/05 5:33 PM	Delivery 'JAR files for FileMarshal SDK' created by srahman@biscom.com.
11/21/05 5:33 PM	Package 'JAR files for FileMarshal SDK' created by srahman@biscom.com.
11/18/05 6:03 PM	Document licenses.xls downloaded (14848 of 14848 bytes) from package 'FileMarshal Licenses' by srahman@biscom.com.
11/18/05 6:03 PM	Document licenses.xls downloaded (14848 of 14848 bytes) from package 'FileMarshal Licenses' by srahman@biscom.com.
11/18/05 5:59 PM	Document File Marshal License.pdf downloaded (32809 of 32809 bytes) through delivery 'FileMarshal end user's agreement' by srahman@biscom.com.
11/18/05 5:59 PM	Document FileMarshal License.doc downloaded (36864 of 36864 bytes) through delivery 'FileMarshal end user's agreement' by srahman@biscom.com.
11/18/05 5:59 PM	Delivery 'FileMarshal end user's agreement' viewed by srahman@biscom.com.
11/18/05 5:59 PM	Delivery 'FileMarshal end user's agreement' viewed by srahman@biscom.com.

Figure 37: User Activity report

Sorting Reports

Columns headings that are highlighted can be sorted. Click the column heading to sort by that column's attribute. Clicking a column that is the currently selected sort will reverse the sort order. Names that are too long to fit in the list are truncated and followed by "…" to indicate that there is more text.

Searching Reports

Enter search terms in the search box to narrow your search. Search terms that match the email address or name columns will appear in the new list of users activity.

Section 8: Biscom Delivery Manager (BDM) Client

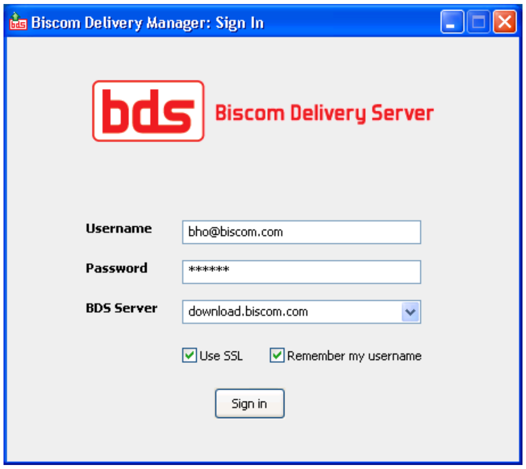
Biscom Delivery Manager

Biscom Delivery Manger is a desktop application that enables users to manage their packages. BDM supports large file uploads and downloads to and from the Biscom Delivery Server. BDM optimizes the connection to maximize throughput when uploading files, and also monitors network connectivity. If network connectivity is suddenly lost while a user is uploading or downloading files, BDM will automatically restart uploading from the point of failure once connectivity is reestablished.

BDM runs as a background service. On Windows, BDM starts up as a system tray application. Closing BDM minimizes the application to the system tray – any files currently being uploaded or downloaded will continue while minimized. As a service, BDM will continue to run even after a user has logged off Windows. If a power failure shuts down the PC during an upload or download, once the machine is powered back on, the upload or download will continue – this does not require the user to log back on to the PC.

Signing In

Users must have the Sender role assigned to use BDM. Start the BDM application and enter the username, password, and delivery server to connect to. If the server supports SSL, select the *Use SSL* checkbox.

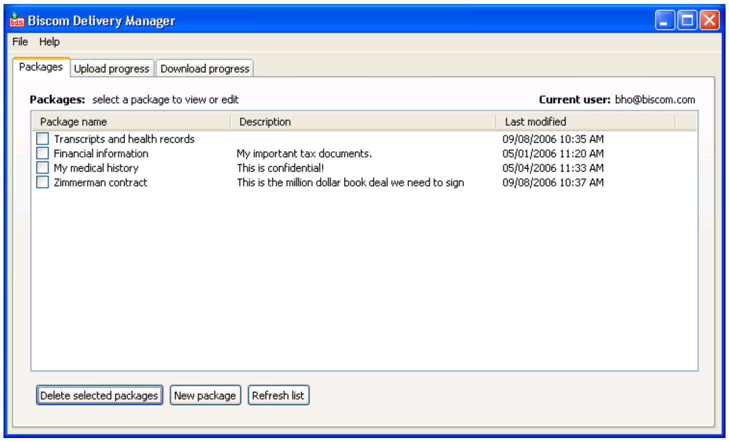


Username bho@biscom.com
Password ******
BDS Server download.biscom.com
☑ Use SSL ☑ Remember my username

Figure 38: BDM Sign in

Viewing Packages

Once signed in, users will see the packages they own in the initial tab. From this screen, users can create new packages, edit existing packages, and delete selected packages.


Biscom Delivery Manager
File
Help
Packages
Upload progress
Download progress
Delete selected packages
New package
Refresh list

Packages: select a package to view or edit

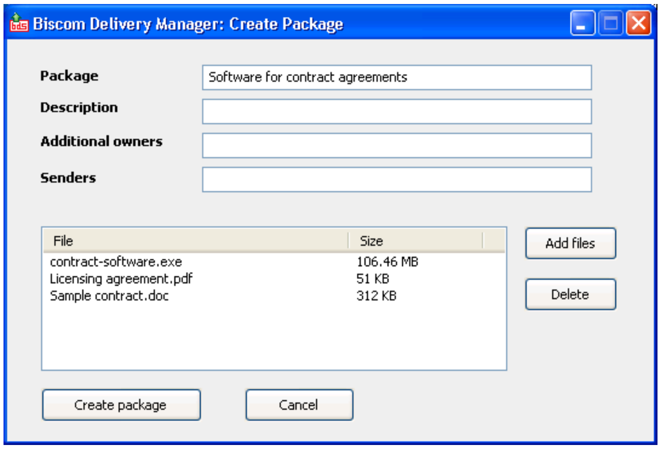
Current user: bho@biscom.com

Package name	Description	Last modified
☐ Transcripts and health records		09/08/2006 10:35 AM
☐ Financial information	My important tax documents.	05/01/2006 11:20 AM
☐ My medical history	This is confidential!	05/04/2006 11:33 AM
☐ Zimmerman contract	This is the million dollar book deal we need to sign	09/08/2006 10:37 AM

Figure 39: BDM Package Manager

Creating a New Package

1. From the Package Manager screen, click the *New package* button.


Biscom Delivery Manager: Create Package
Add files
Delete
Create package
Cancel

Package: Software for contract agreements
Description:
Additional owners:
Senders:

File	Size
contract-software.exe	106.46 MB
Licensing agreement.pdf	51 KB
Sample contract.doc	312 KB

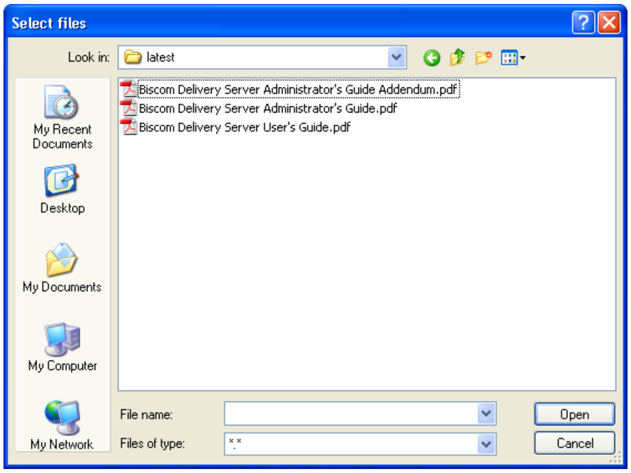
Figure 40: BDM Create Package

2. Enter a package name and other package meta data such as description, additional owners, and senders.

3. Click the *Add files* button to open a file selection dialog box, and select one or more files.

   or

   From the desktop or Windows Explorer, drag one or more files and drop them onto the files section of the create package screen.

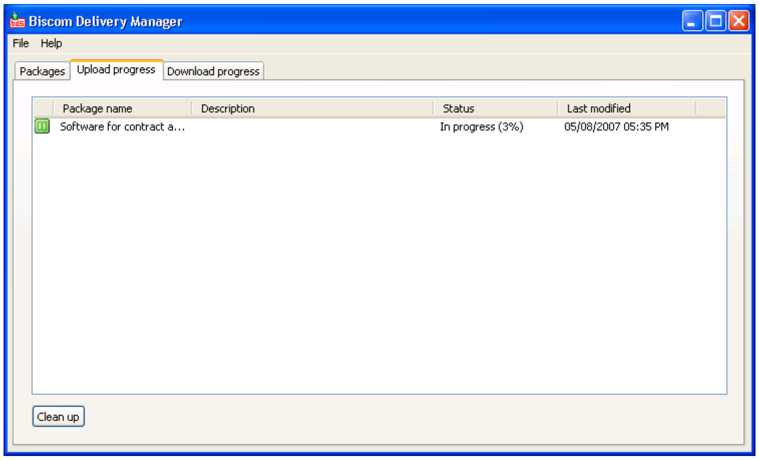

Select files
Look in:
latest
My Recent Documents
Desktop
My Documents
My Computer
My Network
File name:
Files of type:
Open
Cancel

Biscom Delivery Server Administrator's Guide Addendum.pdf
Biscom Delivery Server Administrator's Guide.pdf
Biscom Delivery Server User's Guide.pdf

Files of type: *.*

Figure 41: BDM select files

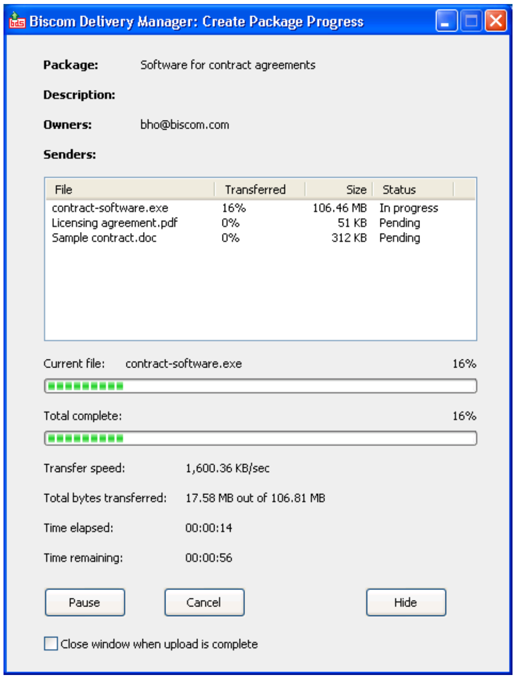
4. Click the *Create package* button.
5. The package will be queued and shown in the *Upload progress* tab. Double click the package name to open the detailed progress screen.


Biscom Delivery Manager
File
Help
Packages
Upload progress
Download progress
Clean up

Package name	Description	Status	Last modified
Software for contract a...		In progress (3%)	05/08/2007 05:35 PM

Figure 42: BDM Upload progress

6. The progress screen displays the list of files currently being uploaded as well as the status of each upload. Progress meters show the upload status for the current file as well as the entire package.



Biscom Delivery Manager: Create Package Progress

Package: Software for contract agreements

Description:

Owners: bho@biscom.com

Senders:

File	Transferred	Size	Status
contract-software.exe	16%	106.46 MB	In progress
Licensing agreement.pdf	0%	51 KB	Pending
Sample contract.doc	0%	312 KB	Pending

Current file: contract-software.exe 16%

Total complete: 16%

Transfer speed: 1,600.36 KB/sec

Total bytes transferred: 17.58 MB out of 106.81 MB

Time elapsed: 00:00:14

Time remaining: 00:00:56

☐ Close window when upload is complete

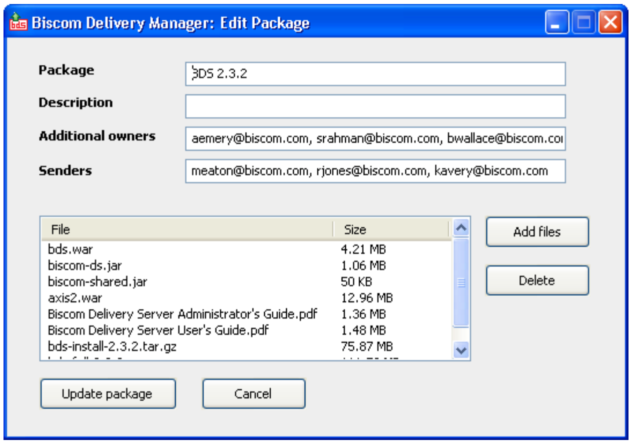
Figure 43: BDM Create Package progress

7. Pressing the *Pause* button will temporarily stop files from uploading and the button will change from *Pause* to *Resume*. Click the Resume button to restart the upload process.

8. By right-clicking on the package line, you can also *Cancel* the package creation and stop the file uploads. Any files that have completed uploading to the delivery server will be deleted. The package will not appear in the list of user packages.

Editing an Existing Package

1. Double click the package name you want to edit to open the Edit Package screen.



Package BDS 2.3.2

Description

Additional owners aemery@biscom.com, srahman@biscom.com, bwallace@biscom.co

Senders meaton@biscom.com, rjones@biscom.com, kavery@biscom.com

File	Size
bds.war	4.21 MB
biscom-ds.jar	1.06 MB
biscom-shared.jar	50 KB
axis2.war	12.96 MB
Biscom Delivery Server Administrator's Guide.pdf	1.36 MB
Biscom Delivery Server User's Guide.pdf	1.48 MB
bds-install-2.3.2.tar.gz	75.87 MB

Figure 44: BDM Edit Package

2. Update the package meta data, such as the package name, description, owners, and senders. Add files by clicking the *Add files* button or dragging and dropping files from your PC. Delete files by selecting files from the files listing and clicking the Delete button.

3. To commit your changes, click the *Update package* button.

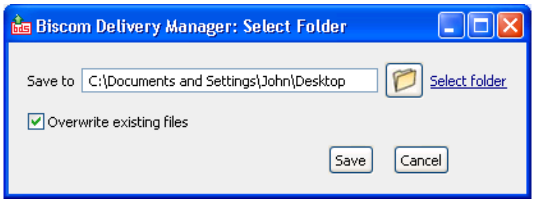
Downloading Files from a Package

1. From the Package Manager tab, open a package.

2. Select files (using Shift-click and Ctrl-click to select multiple files).

3. Click *Download files*.

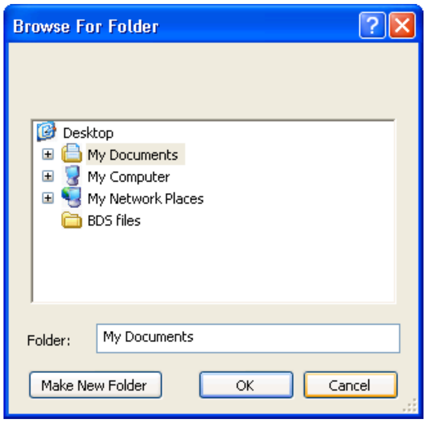
4. A Select Folder dialog will open. Enter the folder name in the *Save to* text field, or click the folder icon or *Select folder* link to open the *Browse for folder* dialog to select an existing folder or to create a new folder.


Biscom Delivery Manager: Select Folder
Select folder
Save
Cancel

Save to C:\Documents and Settings\John\Desktop

☑ Overwrite existing files

Figure 45: BDM Select folder dialog


Browse For Folder
Desktop
My Documents
My Computer
My Network Places
BDS files
Make New Folder
OK
Cancel

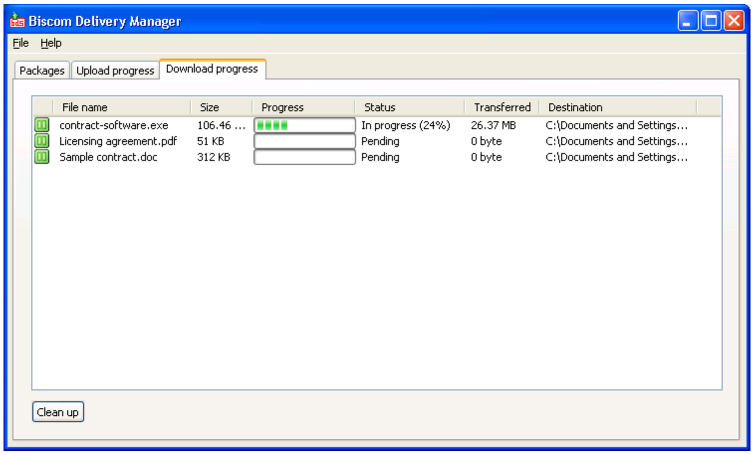
Folder: My Documents

Figure 46: BDM Browse for folder dialog

Select the Overwrite existing files *checkbox if files with the same name exist in the destination folder and you would still like to download the selected files. If this is not checked, any filenames that conflict with existing files will not be downloaded, and an error status will be displayed in the Download progress tab.*

5. Click the Save button to start downloading the selected files.

6. The Download progress tab will be displayed and you will see the individual files and the download progress associated with each file.



File name	Size	Progress	Status	Transferred	Destination
contract-software.exe	106.46 ...		In progress (24%)	26.37 MB	C:\Documents and Settings...
Licensing agreement.pdf	51 KB		Pending	0 byte	C:\Documents and Settings...
Sample contract.doc	312 KB		Pending	0 byte	C:\Documents and Settings...

Figure 47: BDM Download progress

Exiting the Application

Clicking the close button (the "X" in the top right corner of the BDM window) will minimize the application to the system tray. Any packages that are currently being uploaded will continue to upload. To reopen the BDM application, double click the icon in the system tray.

From the File menu, selecting Exit will close the BDM application and remove it from the system tray. Files currently being uploaded will continue to upload even after the user exits the application. To pause files from uploading, click the *Pause* button in the package creation progress screen before exiting the application.

Section 9: Support and Troubleshooting

Frequently Asked Questions

Q. **What's the difference between an Express Delivery and a Standard Delivery?**

A. Express Deliveries are useful when a sender wants to send a package to recipients one time and does not foresee sending those files to more recipients at a later time. In this case, the package metadata is set to default values, and the sender can create the delivery and attach files in one step. If a sender has a package that he wants to send out repeatedly, or create multiple deliveries with different recipients lists or delivery parameters, a standard delivery would be a better method. In this case, the package is a standalone entity that is independent of the deliveries, and most likely will not have any recipient-specific information.

Q. **What is the difference between the Secure Message and Notification Message?**

A. When you enter text into the Notification Message, it is attached to the body of the email sent to all recipients if you choose to send a notification message. Any text you enter into the Secure Message text box can only be viewed by recipients once they successfully sign in to the system and open your delivery.

Q. **Why can't I see all the icons or functionality that are shown in the figures in this User Guide?**

A. The icons (or functionality) that users see are based on the roles that you have been assigned. If you have questions about your roles or would like to have additional functionality, contact your Biscom Delivery Server administrator.

Q. **When I click on an email notification delivery link, I can't view the package anymore.**

A. Most likely, the sender of the delivery has deleted the delivery or removed you from the list of recipients. Another possibility is that the delivery has expired. In any of the above cases, you will no longer have access to the package and will no longer see the delivery in your list of deliveries when logged onto the system.

Q. **Can administrators view the contents of my packages or deliveries?**

A. No, administrators cannot view the packages or deliveries of other users, unless the administrator is also the owner of a package or a recipient of the same delivery.

Q. **I was in the middle of creating a delivery and stepped away from my computer. When I got back and tried to finish my delivery, I was signed out. What happened?**

A. When you sign into Biscom Delivery Server, the application will "time out" in approximately 15 minutes if you have not been actively using it, unless the default timeout has been changed to a different setting. Consult your administrator about this setting if you have any questions.

Q. **When I create a new user as a Sender, or import users with the Sender role specified, they do not have the sender role assigned. What's happening?**

A. You may have a system that has a restriction on the total number of Senders allowed on the system at once. Once the number of Senders has reached the maximum allowed, no new users will be allowed to have the Sender role assigned. Users added through the import facility will be created, but they will not have the Sender role assigned. You may remove the Sender role from one user and reassign it to another user on the system, as long as the total number of Senders does not exceed the maximum allowed.

Q. **I have the Outlook Add-in installed on my computer, but none of my messages seem to be going out.**

A. There may be multiple issues here. First, check with your administrator that your server supports the Outlook Add-in (this is an optional module). Also, have your administrator check your BDS user and make sure that your user is allowed to use the Outlook Add-in. Finally, in your Outlook client, open the menu Tools > Options and select the Biscom Delivery Server Outlook Add-in tab. Ensure the email address and your user name and password are set correctly.

Q. **Biscom Delivery Manager isn't upload or downloading my files.**

A. Check to make sure the server you are signed into is up and running by signing in through the Web application interface. If you can sign in, ensure that you are able to create new packages and upload files.

Next, check to see if the Biscom Delivery Manager service is running on your machine. Open the Manage Services window (right click the My Computer icon and select Manage), and view the list of services. Highlight the Biscom Delivery Manager service, and make sure it is running. Try stopping and then restarting the service, even if it is currently running.

Appendix A: Microsoft Outlook Add-in (Optional)

Microsoft Outlook Add-in

Biscom Delivery Server supports Microsoft Outlook clients, providing senders a quick and simple way to create express deliveries from within their Outlook email program. With the Outlook Add-in, you can access the Biscom Delivery Server through your Outlook program and can use your Outlook contacts as well as have the ability drag and drop files from your desktop to a Biscom Delivery Server delivery.

This feature is an option that the administrator may or may not have installed on your server. If Microsoft Outlook Add-in has been installed on your computer, you will see a new button on your Outlook toolbar.

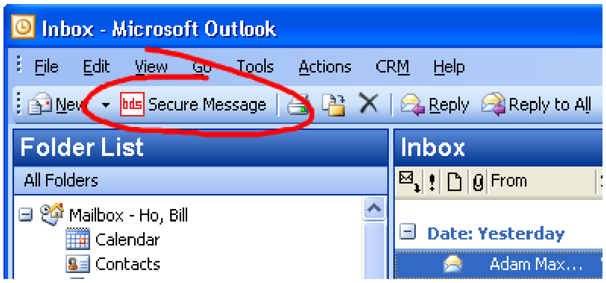

Inbox - Microsoft Outlook
File
Edit
View
Go
Tools
Actions
CRM
Help
New
Secure Message
Reply
Reply to All
Folder List
All Folders
Mailbox - Ho, Bill
Calendar
Contacts
Inbox
From
Date: Yesterday
Adam Max...

Figure 48: Microsoft Outlook Add-in button

To send a secure delivery via Microsoft Outlook, follow these steps:

1. Click the Secure Message button (Figure 48) to open a secure message window.

   This form is similar to the new email message window, but has two tabs – the first tab (Figure 49) contains message information, including the To, Cc, and Bcc fields, as well as the subject field, and the notification message (the large text area below the subject field). The second tab (Figure 50) contains the delivery options.

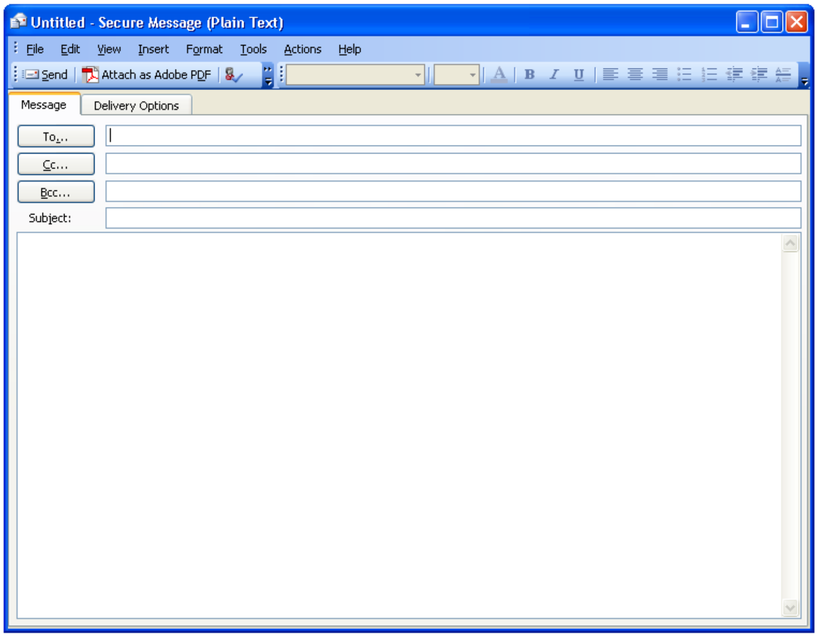

Untitled - Secure Message (Plain Text)
File
Edit
View
Insert
Format
Tools
Actions
Help
Send
Attach as Adobe PDF
Message
Delivery Options
To...
Cc...
Bcc...
Subject:

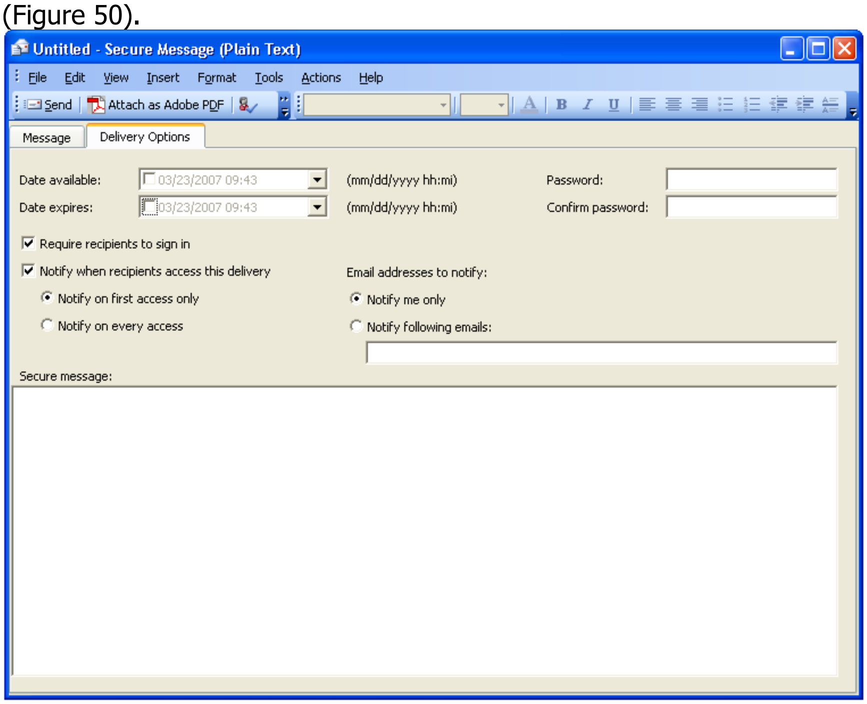
Figure 49: Microsoft Outlook Add-in Message tab

19. On the Message tab, enter the message information as outlined in the following table:

To, Cc, Bcc	Enter recipients directly into the recipient fields or open your contacts to select recipients. ***Note**: The Secure Message add-in does not support email groups. Each recipient must be entered individually.*
Subject	Enter a subject for your delivery – this will be saved as the package name on the Biscom Delivery Server.
Message	Enter a notification message in the memo field below the subject line. The contents of this field are sent as the notification message to all recipients. ***Note**: Information entered in this field can be read by any recipient of the message and/or can be forwarded to any valid e-mail address. We recommend that you not include secure or privileged information in the notification message. For a secure message, use the message field in the Delivery Options tab (Figure 50).*

20. Attach files to the Secure Message as you would for any Outlook message. This includes simply dragging and dropping files from your desktop or network file server onto the message field.

21. Click the Delivery Options tab if you would like to specify additional delivery options (Figure 50).



Date available: ☐ 03/23/2007 09:43 (mm/dd/yyyy hh:mi)

Date expires: ☐ 03/23/2007 09:43 (mm/dd/yyyy hh:mi)

Password:

Confirm password:

☑ Require recipients to sign in

☑ Notify when recipients access this delivery

● Notify on first access only

○ Notify on every access

Email addresses to notify:

● Notify me only

○ Notify following emails:

Secure message:

Figure 50: Microsoft Outlook Add-in Delivery Options tab

a. The additional delivery options are the same delivery options your have access to when creating a regular or express delivery in the Biscom Delivery Server web application (see Deliveries on page 20).

b. Enter a message in the Secure Message field. This message will not be part of the notification email sent to the recipients. Recipients will only have access to the secure message after they have provided the proper credentials and have signed into the Biscom Delivery Server.

22. Press the **Send** button on the message toolbar to create your secure delivery.

***Note**: The Outlook Add-in does not support replies, forwarding, or resending of secure messages. If a recipient of an Outlook secure message replies, the reply will be sent to the sender’s email address and will not be secure.*

Appendix B: User and Contact Import File Formats

Import Formats

Users can import contacts using an XML file or a tab delimited text file. Administrators can import users into the system using an XML file or tab delimited text file. The user and contact import formats are similar, but user import data contains information that is not contained in the contact import data, and vice versa.

User Import

Tab Separated User Import File Format:

The file should have the following format:

Import Field	Notes	Example
firstname		John
middlename		J.
lastname		Smith
displayname	Replaces the email address when displaying the username if this field is populated.	John Smith
email	Required field	jsmith@bigcompany.com
password	If a password is entered, the default password specified in the import page will be used.	bosco
roles	Possible values: RECIPIENT, SENDER, REPORT, ADMIN If more than one is specified, separate them with a + sign. Values must be capitalized.	RECIPIENT+SENDER+ADMIN
outlook	This is only valid for users with the Sender role assigned	true
company		BigCompany, Inc.
jobtitle		Director of Cheese
workphone		617-555-2302
workmobile		617-555-6432

workfax	617-555-1232
workotherphone	617-555-0201
workaddress1	123 Main St.
workaddress2	Suite 200
workcity	Boston
workstate	MA
workzipcode	02110
workcountry	USA
homephone	617-555-0392

Notes:

- The list above shows the import fields listed vertically – however, the import file should have the fields listed horizontally.
- The import file should contain the import fields as the first row, separated by tabs.
- Enter data in subsequent rows under each field. If you are not specifying a particular field, enter a tab.
- If you want to align the text under the column headings, you can insert multiple tabs between the import data. However, you must select the checkbox when importing to condense multiple tabs into one tab.
- The columns can be arranged in any order.
- The roles assigned to a user are separated by a plus ("+") sign with no spaces between the role and the plus sign. The four roles above are the only roles accepted.
- The email field is the only required field. If you do not enter values for the other fields, you must still enter a "tab" between the fields. This is especially important if you do not enter values for intermediate columns but you enter values for subsequent columns.

XML User Import File Format:

The XML file should have the following format:

```
<?xml version="1.0"?>
<contacts>
      <person>
            <name>
                  <first></first>
                  <middle></middle>
                  <last></last>
                  <display></display>
            </name>
            <email></email>
            <password></password>
            <roles>
                  <role></role>
            </roles>
            <outlook></outlook>
            <work>
                  <company></company>
                  <jobtitle></jobtitle>
                  <phone></phone>
                  <mobile></mobile>
                  <fax></fax>
                  <otherphone></otherphone>
                  <address>
                        <street1></street1>
                        <street2></street2>
                        <city></city>
                        <state></state>
                        <zipcode></zipcode>
                        <country></country>
                  </address>
            </work>
            <home>
                  <phone></phone>
            </home>
      </person>
</contacts>
```

Notes:

- Child elements of a tag may be entered in any order
- Certain characters must be escaped:

  a. `&        ->    &amp;`

  b. `<        ->    &lt;`

  c. `>        ->    &gt;`

  d. `‘        ->    &apos;`

  e. `“        ->    &quot;`

Contact Import

These contacts are personal contacts and do not affect or pre-register users into the Biscom Delivery Server. Only administrators can create users (see above) by using an import file.

Tab Separated Contact Import File Format:

The file should have the following format:

Import Field	Notes	Example
firstname		Laura
middlename		W.
lastname		Parker
nickname		Laura
email		laura.parker@smallinsuranceco.com
email1	alternate email 1	lauraathome@gmail.com
email2	alternate email 2	
company		Small Insurance Company
jobtitle		Sales Associate
workphone		415-555-1023
workmobile		415-555-9823
workfax		415-555-6549
workpager		415-555-6544
workotherphone		415-555-2312
workwebsite		www.smallinsuranceco.com
workaddress1		882 Technology Drive
workaddress2		Rm. 322
workcity		San Francisco
workstate		CA
workzipcode		94109
workcountry		USA
birthdate		01/08/1980
homephone		415-555-2031
homewebsite		
homeaddress1		230 Battery St.

homeaddress2	Apt. 209
homecity	San Francisco
homestate	CA
homezipcode	94105
homecountry	USA
notes	Sold me insurance for my pet iguana
category	Business

Notes:

- The list above shows the import fields listed vertically – however, the import file should have the fields listed horizontally.
- The import file should contain the import fields as the first row, separated by tabs.
- Enter data in subsequent rows under each field. If you are not specifying a particular field, enter a tab.
- At least one of the following fields must be entered for each contact:
  a. First name
  b. Last name
  c. Nickname
  d. Email address

XML File Format:

The XML file should have the following format:

```
<?xml version="1.0"?>
<contacts>
      <person>
            <name>
                  <first></first>
                  <middle></middle>
                  <last></last>
                  <nick></nick>
            </name>
            <email type="primary"></email>
            <email type="alt1"></email>
            <email type="alt2"></email>
            <work>
                  <company></company>
                  <jobtitle></jobtitle>
                  <phone></phone>
                  <mobile></mobile>
                  <fax></fax>
                  <pager></pager>
                  <otherphone></otherphone>
                  <website></website>
                  <address>
                        <street1></street1>
                        <street2></street2>
                        <city></city>
                        <state></state>
                        <zipcode></zipcode>
                        <country></country>
                  </address>
            </work>
            <home>
                  <birthdate></birthdate>
                  <phone></phone>
                  <website></website>
                  <address>
                        <street1></street1>
                        <street2></street2>
                        <city></city>
                        <state></state>
                        <zipcode></zipcode>
                        <country></country>
                  </address>
            </home>
            <notes></notes>
            <category></category>
      </person>
</contacts>
```

Notes:

- Child elements of a tag may be entered in any order
- Certain characters must be escaped:

    a. & -> &amp;
    b. < -> &lt;
    c. > -> &gt;
    d. ‘ -> &apos;
    e. “ -> &quot;

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